AGent

User Administration

Version 3.3

User Guide

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a-g canada ltd.

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TABLE OF CONTENTS

INTRODUCTION

This User Guide is designed to provide a working understanding of the features and functions of AGent User Administration (for authenticated systems).

Overview

User Administration is an online application that provides administrative control over your library's database of authorized (authenticated) users; both library staff and patrons. Using User Administration, you can:

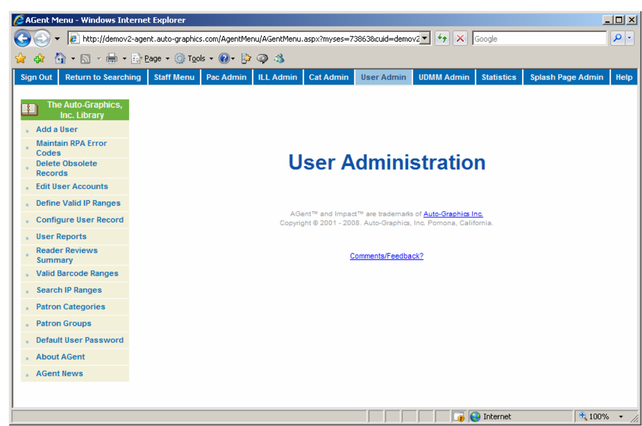
- Add, edit and delete users for your library or consortium
- Generate user reports
- Manage the user database

The Web Interface

The User Administration web interface is designed to provide a logical and efficient means of performing administrative functions. The screens are structured to assist workflow, and contain navigational links and "expandable" menus to provide "single-click" access to administrative features and functions.

The User Administration Menu

The **User Administration** menu provides access to features and functions related to administration of your library's database of authenticated users.



User Administration Menu

To access the User Administration menu:

1. Click the **Staff Menu** button on *any* screen in the AGent Search interface.
   - The Staff Menu screen displays.
2. Click the **User Admin** button to display the **User Administration** menu.

> If User Administration is your *default* login mode, the User Administration "Welcome" screen displays *automatically* when you select **Staff Menu** from the AGent Search interface (refer to the ***AGent User Guide*** for information on configuring your default login mode).

3. The **User Administration** menu provides access to the following options:
   - **Add a User** – Lets you add a new authenticated user (patron or staff member) to your library's user database (see ***Adding a User*** on page **2-1** for details).
   - **Maintain RPA Error Codes** – Lets you define "block" codes (provided by your library's remote ILS) that will prevent patron access to AGent (see ***Maintaining RPA Error Codes*** on page **3-5** for details).

- **Delete Obsolete Records** – Lets you delete obsolete user records from your library's user database (see ***Deleting Inactive Users*** on page **3-7** for details).
- **Edit User Accounts** – Lets you edit or delete an existing user record in your library's user database (see ***Editing User Accounts*** on page **2-11** for details).
- **Define Valid IP Ranges** – Lets you define valid IP ranges for workstations *within your library* through which "generic" patron access to AGent will be allowed (see ***Defining Valid IP Ranges*** on page **3-1** for details).
- **Configure User Record** – Lets you configure the content and arrangement of the *default* user record for your consortium or collective (see ***Configuring the User Record*** on page **4-1** for details).

The **Configure User Record** function is available *only* to Customer SuperUsers.

- **User Reports** – Lets you generate database reports for your library's user database (see ***Generating User Reports*** on page **2-21** for details).

Customer SuperUsers may generate user database reports for *any library* in a consortium or collective (see ***Generating User Reports*** on page **4-3** for details).

- **Reader Reviews Summary** – Provides a means of managing "book reviews" created by library patrons and/or staff members through the AGent Search module (see ***Working with Reader Reviews*** on page **3-8** for details).
- **Valid Barcode Ranges** - Lets you specify the valid barcode range(s) for which access to barcode authenticated databases will be granted (see ***Defining Valid Barcode Ranges*** on page **3-3** for more details).

The **Valid Barcode Ranges** function is available *only* to User Administrators that are also granted Library SuperUser permissions (see the ***AGent PAC Administration User Guide*** for more information).

- **Search IP Ranges** – Lets you generate a listing of *all libraries* that have configured a specified IP range as *valid* using the **Define Valid IP Ranges** function (see ***Searching IP Ranges*** on page **4-4** for details)

The **Search IP Ranges** function is available *only* to Customer SuperUsers.

- **Patron Categories** – The **Patron Categories** function is associated with the *optional* **ILL Request Limits** feature (see the ***AGent ILL Administration User Guide*** for more information) that lets you create and maintain *one or more* Patron Categories to which patrons may be assigned for the purpose of restricting the number of ILL requests a patron may have active at any given time (see ***Managing Patron* Categories** on page **2-26** for details).

The **ILL Request Limits** feature is *optional*, and may not be enabled for all systems

- **Patron Groups** – The **Patron Groups** function provides an additional level of control over access to specific resources. **Patron Groups** lets you create and maintain *one or more* Patron Groups to which patrons may be assigned (see ***Managing Patron Groups*** on page **3-27** for details). Once created, access to selected Resources can be restricted, through the PAC Administration module, to *only* those patrons associated with a specified Patron Group (see the ***AGent PAC Administration User Guide*** for more information).

- **Default User Password** – Lets you specify a *default* user password to be applied to all *new* user records (patron and staff) that are created in the AGent User Administration module (see ***Setting the Default User Password*** on page **2-12** for details).
- **About AGent** - Displays the "About AGent" screen.
- **AGent News** - Displays the AGent "News" page.

4. Click the **Return to Searching** button to return to the AGent Search interface.

Organization of the User Guide

This User Guide is designed to provide an overview of the features and functions of the AGent User Administration module, and includes the detailed procedures to maintain your library's database of authenticated users. The User Guide is divided into three chapters, as follows:

Chapter 1 – Getting Started. This chapter explains how to prepare to use User Administration. The chapter includes hardware/software requirements, system availability, and system Login and Logoff.

Chapter 2 – Managing Users. This chapter provides the procedures to add, edit and delete authenticated users (library staff or patrons) for your library or consortium, and to generate user reports.

Chapter 3 – Managing the User Database. This chapter provides the procedures to import user records from an external file, to delete obsolete user records from your library's user database, to define valid IP ranges (for IP authenticated systems), to define valid barcode ranges (for access to barcode authenticated databases) and to maintain remote patron authentication (RPA) error codes (for systems utilizing remote patron authentication).

Optional Features

AGent is modular in design, and offers libraries a high degree of flexibility in configuring the system to suit the specific needs of their patrons and staff members. The "basic" AGent search module can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging, Union Database Management, Statistics, ILL Administration, and/or Splash Page Administration. Additionally, a number of *optional* features and functions are available within each AGent module.

This manual provides instructions covering *all* features and functions available through AGent User Administration. Depending on the *specific* configuration of AGent for *your* library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics Sales and Marketing.

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Chapter 1. GETTING STARTED

This chapter identifies the hardware and software necessary to access and operate AGent User Administration, where to get help, procedures for system Login and Logoff, and how to change the Staff Login password.

Hardware/Software Requirements

AGent can be accessed by a Web-capable PC (486 minimum) or Macintosh using a conventional Internet account and a Java-enabled Web browser such as Microsoft Internet Explorer (version 5.5 *minimum*), Netscape (version 6.2 *minimum*), or Firefox (version 1.0.7 *minimum*). No stringent hardware requirements are necessary to support AGent. User Administration is available through appropriate Staff Login to AGent (see ***Logging In*** on page **1-2** for details).

System Availability

User Administration is available, via AGent, 24 hours daily.

Getting Help

If you need help using User Administration, contact Auto-Graphics' Help Desk by one of the following means:

voice: (800) 852-8686 5am ~ 5pm Pacific Time
email: HelpDesk@auto-graphics.com
fax: (909) 595-5190

Before calling the Help Desk, consider referencing one of the following sources of information:

- **Online Help**. User Administration's HTML-based Help displays in a separate browser window that you can view concurrently with your online session.
- The **AGent News** link in the **Staff Menu** on *all* staff screens is intended to be a source for helpful information and documentation. From this link you can view the latest Release Bulletins, Product Information Bulletins, User Guides and News Items.

Configuring Your Browser for AGent

When a browser is installed on your workstation, it is configured with a *default* set of preferences. Some of these preferences must be modified to configure the browser for use with AGent. You must verify the browser is properly configured to ensure full access to all features and functions available through AGent. Refer to *Product Information Bulletin AGent-009, Configuration Recommendations for Browsers and Firewalls* for more information.

Configuring Your Popup Blocker

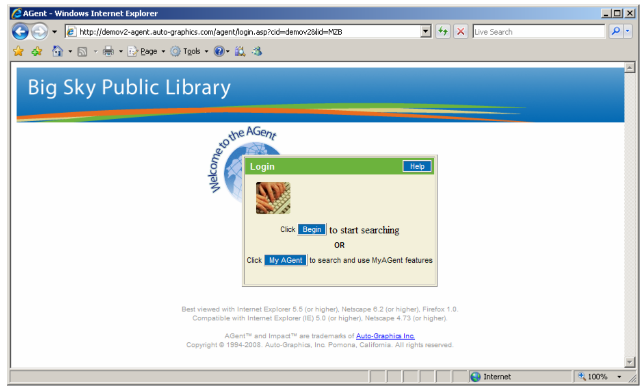
AGent uses "popup" windows to display search results, "Help" files and other information screens. "Popup" blockers will prevent the display of these screens. In order to access all features and functions available through AGent, you must configure your popup blocker for operation with AGent. Refer to *Product Information Bulletin AGent -010, Using AGent with 'Popup' Blockers* for more information.

Logging In

> If the Splash Page has been enabled for your library, see ***Logging In from the Splash Page*** on page **1-5** for login procedures.

Staff access to AGent is password-protected. You *must* provide a valid **Username or Barcode** and **Password or PIN** to log into AGent with staff privileges.

Some workstations *within your library* may be configured to provide "generic" patron access to AGent based on the IP address of the workstation. If your library utilizes "IP authentication" for "generic" patron login, and your workstation falls within the specified IP range, the "IP Authenticated" screen displays when you first access AGent. Click the **My AGent** button to display the Login screen (click the **Begin** button to access AGent as a "generic" patron).



"IP Authenticated" Screen

> If your library has enabled the *optional* "Suppress 'My AGent' Login" feature, the **My AGent** button *is not* shown on the "IP Authenticated" login screen. You *cannot* perform an authenticated login to AGent from this workstation.

Some AGent systems may be configured to provide authentication via a "cookie" saved to your workstation. If you wish to save a "cookie" containing your login information to your workstation for future logins, select the **Remember me** checkbox on the login screen, then submit your login request.

- A *checkmark* ☑ indicates a "cookie" *will* be saved to your workstation.
- An *empty checkbox* ☐ indicates a "cookie" *will not* be saved to your workstation.
- Clicking the checkbox will toggle it on and off.

> If your workstation is used by *more than one* person, to prevent unauthorized access to AGent staff features and functions, it is recommended that you *do not* save your login information to a "cookie".

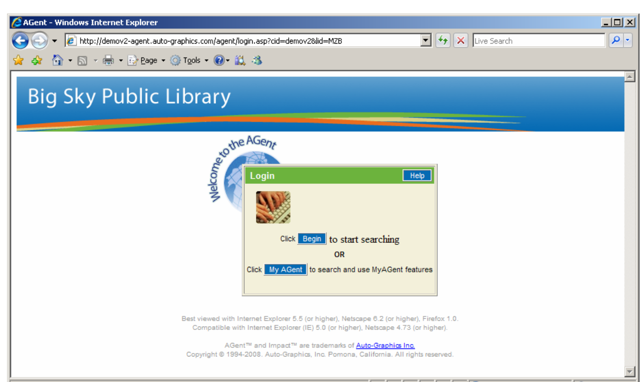
Once your login information has been saved to a "cookie" on your workstation, the Authenticated User Login screen will display each time you access AGent. Click the **Begin** button to login using the saved login data.

> If you choose to login as a *different* user, the "cookie" containing your current login data will be *overwritten* with the new login data.

To login to AGent:

1. On the Login screen, enter your library name in the **Library** text box as necessary.
   - By default, the system will prefill the library name for your library.

   > If desired, you may use the **Lookup** feature to locate the code for the library to which you wish to login (see ***Using Library Code Lookup*** on page **1-4** for details).



Login Screen

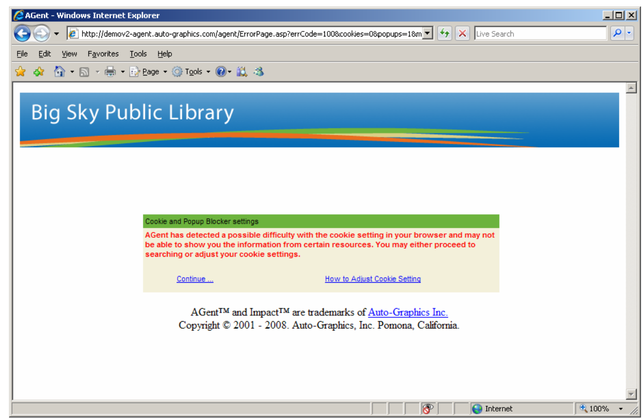
2. Enter your user name in the **Username or Barcode** text box.
3. Enter your password in the **Password or PIN** text box.
   - Your password will display on the screen as a series of asterisks.

> In some cases, libraries may assign the default password "USERPASS" or "STAFFPASS" when creating an account for a new user (library patron or staff member). When you log into AGent for the *first time* using the default password "USERPASS" or 'STAFFPASS", you are prompted to provide a *permanent password* to complete the login process (see ***Entering Your Permanent Password*** on page **1-5** for details).

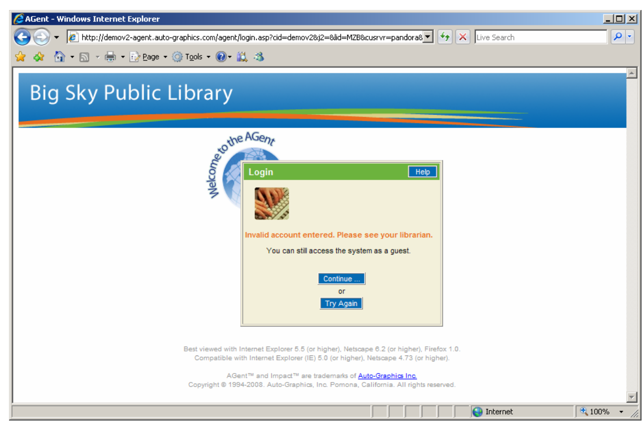
> On systems configured with the *optional* multiple-language display feature, the **Select your Language** menu is used *only* for "guest" logins to AGent. You can use the **My Preferences** function to set the desired *default* display language for your account (see the ***AGent User Guide*** for details).

4. Click the **Go** button to submit your Login request.
   - If your library provides access to third-party databases that require cookies for authentication, and your browser's Privacy/Security settings are not sufficient to accept cookies from third-party databases, an advisory "Cookie Settings" message displays.
     - If you wish to ensure access to third-party databases that require cookies for authentication, adjust your browser's Privacy/Security settings, as needed (see the ***AGent User Guide*** for details), then click the **Continue** link to complete your login.
     - If you *do not* wish to change your browser's Privacy/Security settings, click the **Continue** link to complete your login.

> If you choose *not* to adjust your browser's Privacy/Security settings, searches of *any* databases utilizing "cookie authentication" will fail.



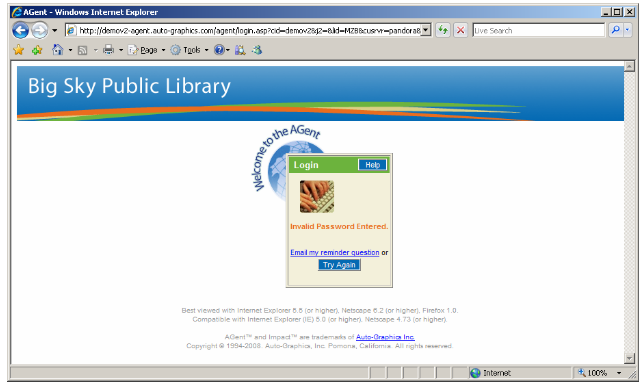
Cookie Settings Message



"Invalid Account Entered" Screen

   - If your Login request is *unsuccessful*:
     - If you enter an *invalid* **Username or Barcode**, the message "Invalid account entered. Please see your librarian." displays. Click the **Continue** button to login to AGent as a "guest", or click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.

- If you enter an *invalid* **Password or PIN** with a *valid* **Username or Barcode**, the message "Invalid Password Entered" displays. Click the **Email my reminder question** link to receive an email copy of your password reminder question and return to the staff login screen. Make any necessary corrections to the **Library** name, **Username or Barcode** and **Password or PIN**, then click the **Go** button to resubmit the form.



"Invalid Password Entered" Screen

> If an email address *is not* included in your user profile, or if you do not wish to receive an mail copy of your password reminder message, click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.

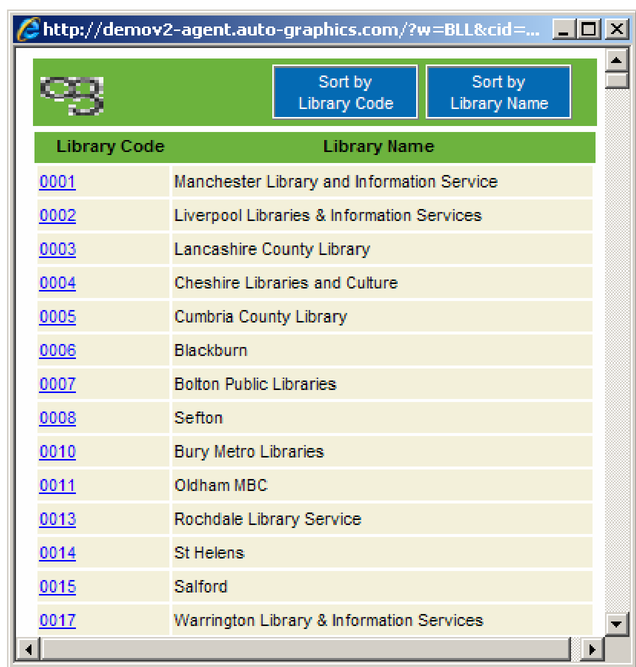
- If your Staff Login request is *successful*:
  - AGent enters the *default* staff mode for your user account.
  - Appropriate links and buttons are added to Title Lists and Full Record Displays throughout AGent.

Using Library Code Lookup

If you are not sure of the **Library** code for your library, or if you wish to login to a *different* library, you can use the library code **Lookup** feature to locate the desired library code.

To use Library Code Lookup:

1. Click the **Lookup** button on the Login screen.
   - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
   - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
   - Click the **Sort by Library Name** button to sort the list alphabetically by library name.



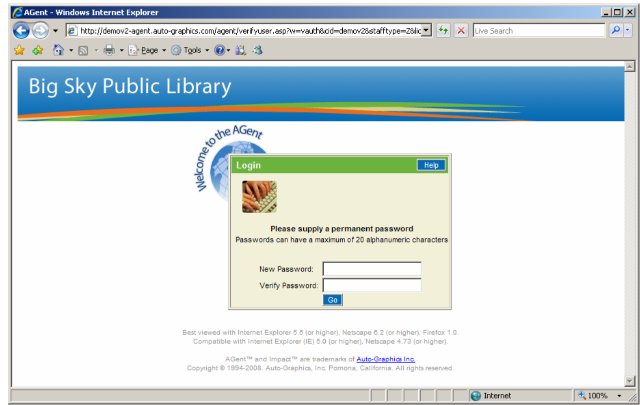
Library Code Lookup Screen

2. Click the **Library Code** for the library to which you wish to login.
   - The Library Code Lookup screen closes, and the selected library code is entered in the **Library** text box on the Login screen *automatically.*

Entering Your Permanent Password

When you log into AGent for the *first time* using the default password "USERPASS" or "STAFFPASS", the Permanent Password screen displays.

You *must* provide a permanent password to complete the login process. Select a password that you will remember. Your password may be a *maximum* of 20 characters in length, with *no spaces*. Your password may have *any combination* of alphabetic and numeric characters, and the underscore "_" character. Your password *is not* case-sensitive.



Permanent Password Screen

To enter your permanent password:

1. Enter the password you have chosen in the **New Password** and **Verify Password** text boxes.

   Enter the password in *exactly* the same way in *both* text boxes.

2. Click the **Go** button to save your permanent password and complete the login process.
   - If you enter an invalid password, an error dialog displays the message "Passwords do not match."
     - Make sure there are *no spaces* in your password.
     - Make sure you enter your password in *exactly* the same way in both the **New Password** and **Verify Password** text boxes.
   - Re-enter your password in the **New Password** and **Verify Password** text boxes, then click the **Go** button.

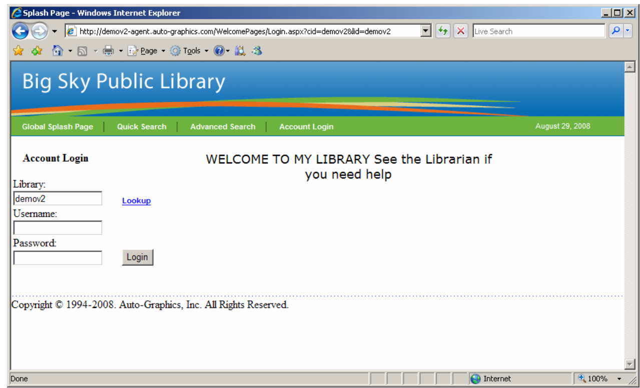
REMEMBER TO KEEP YOUR PASSWORD SECURE. **DO NOT** tell your personal password to anyone. **DO NOT** write your password down. You will use your new password for all future logins, so remember it! If you think your password may be compromised, you can change it at any time using the **My Account** feature (see the ***AGent User Guide*** for details). If you forget your password, notify your Library or System Administrator.

Logging In from the Splash Page

If your library has enabled the *optional* Splash Page feature, your library's Splash Page displays when you access the system.

To login from the Splash Page:

1. Click the **Account Login** button on the Splash Page.
   - The Account Login screen displays.
2. Enter your user name in the **Username** text box.
3. Enter your password in the **Password or PIN** text box.
   - Your password will display on the screen as a series of asterisks.
4. Click the **Login** button to submit your Login request.



Account Login Screen

Logging Off

To prevent unauthorized access to staff features and functions, you must exit User Administration *and* log off from AGent.

To exit User Administration:

- Click the **Sign Out** button on *any* AGent screen.
  - The AGent Login screen displays.

If your library has enabled the “Display Browser Home Page on Sign Out” option, the “Home page” for the browser from which you accessed AGent displays when you sign out of AGent.

Chapter 2. MANAGING USERS

AGent's User Administration module lets you add, edit or delete authenticated users within your library's database.

This chapter provides the procedures to:

- Add a new authenticated user to the database
- Edit the user account for an existing authenticated user
- Delete an existing authenticated user account

About AGent Users

AGent can be accessed by three types of users: guests, patrons, and library staff.

Guest users are *unauthenticated* users who access your library's AGent system via the Internet from *outside* the library. Guests are generally offered a "limited" set of search resources (see the ***AGent PAC Administration User Guide*** for more information), cannot submit Interlibrary Loan requests, and are not granted access to AGent's "My Account" feature (see the ***AGent User Guide*** for more information).

Patron users can be either *unauthenticated* or *authenticated*. **Unauthenticated patrons** are users who access your library's AGent system from an IP-authenticated workstation *inside* the library *without* providing login credentials (**Username or Barcode** and **Password or PIN**). **Authenticated patrons** are users who access your library's AGent system (from either inside *or* outside the library) and provide valid login credentials. Patrons are generally offered an "expanded" set of search resources (see the ***AGent PAC Administration User Guide*** for more information), and *may* be authorized to participate in Interlibrary Loan. Additionally, authenticated patrons are granted access to AGent's "My Account" and "My Preferences" features (see the ***AGent User Guide*** for more information).

Each library is provided with a "generic" patron account. Library staff may log into AGent using the "generic" patron account to access the "My Account" and "My Preferences" features to configure several system defaults for unauthenticated users (see the ***AGent User Guide*** for more information). Additionally, the "generic" patron account is used to enable or disable Interlibrary Loan permissions for unauthenticated patrons *and* to set the *default* Interlibrary Loan permissions for authenticated patrons (see ***Configuring ILL Permissions for Patrons*** on page **2-15** for details).

Staff users are library staff members who access the AGent system (from either inside *or* outside the library) and provide valid login credentials (**Username or Barcode** and **Password or PIN**). Staff users are granted access to AGent's search interface, and to one or more staff module (ILL Administration, CAT Administration, etc.). Staff users are also granted access to AGent's "My Account" and "My Preferences" features (see the ***AGent User Guide*** for more information).

Adding a User

You can add an authenticated user for your library *only*.

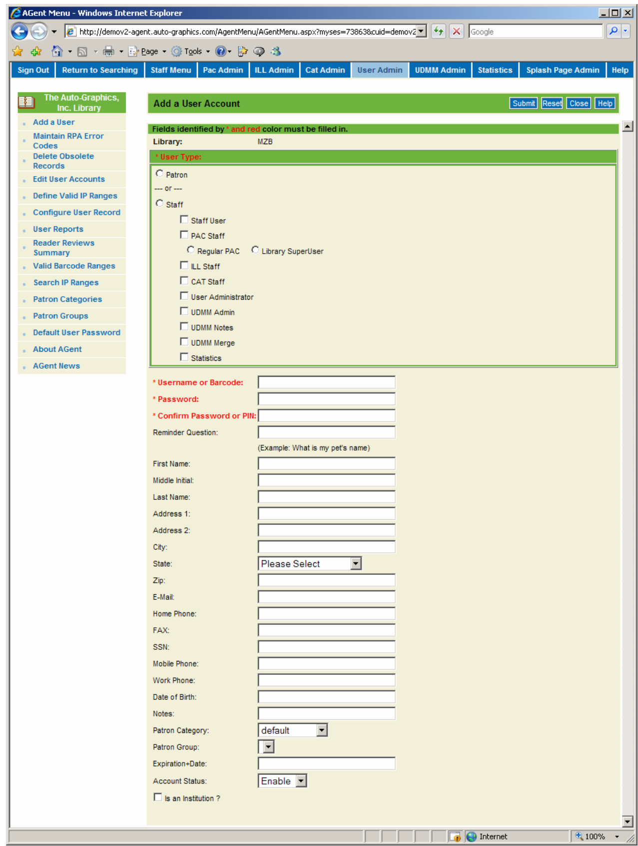
To add a user:

Mandatory fields are indicated by a red asterisk "*"; all other fields are *optional*.

The content and arrangement of the User Record is *customer-selectable* (see the ***Agent Customer SuperUser User's Guide*** for details). Depending on the specific configuration of AGent for your library or consortium, some User Record fields *may not* be available.

1. From the **User Administration** menu, select **Add a User**.

   - The Add a User Account screen displays. The **Library** field shows the library code for the library to which the new user account will be added.



Add a User Account Screen

2. Assign the user to *one or more* desired user groups using the **Group ID** checkboxes and radio buttons.

You *must* assign the user to *at least one* user group. If you do not assign the user to *at least one* **Group ID**, a dialog displays the message "Please select at least one Group ID" when the record is saved. Click the **OK** button on the dialog to close the message, and select at least one **Group ID** for the user.

   - Select *either* the **Patron** *or* the **Staff** radio button.

     - **Patron** – User can access AGent as an *authenticated* library patron (see the ***AGent User Guide*** for details).

     - **Staff** – User can access AGent as an *authenticated* staff member, with access to *one or more* staff modules.

A user can be *either* a "patron" *or* a "staff user". A user cannot be *both* a "patron" *and* a "staff user".

   - For **Staff** users, use the **Group ID** checkboxes and radio buttons to select *one or more* staff modes to which the user will be granted access. A description of each available staff mode is provided below.

Group ID	Description
Staff User	User can view Database Statistics via the Statistics module. (User *must* also be assigned to the **Statistics** Group ID.)
PAC Staff	**Regular PAC** - User can access all standard administrative functions within the AGent PAC Administration module (see the ***AGent PAC Administration User Guide*** for details). **Library SuperUser** – User can access all standard administrative functions within the AGent PAC Administration module, can manage Valid Barcode Ranges, can view the Z39.50 Transaction Error Log, (see the ***AGent PAC Administration User Guide*** for details), and can configure ILL Pick Lists (see the ***AGent ISO ILL Administration User Guide*** for details).

Group ID	Description
ILL Staff	User can access the AGent ILL Administration module; by default, user is granted all permissions *except* **Cancel/Change request**, **Change any library** and **Patron Request Tracking** (see the ***AGent ILL Administration User Guide*** for details). When you save the record, you are given the opportunity to grant or deny *additional* ILL permissions (see ***Modifying ILL Permissions*** on page **2-5** for details).
CAT Staff	User can access all functions within the AGent CAT Administration module (see the ***AGent CAT Administration User Guide*** for details). If your library has purchased the *optional* AGCat module, the user's AGCat permissions are set to **Cannot Update Bib** and **Cannot Update HLD** by default. When you save the record, you are given the opportunity to modify the user's AGCat permissions (see ***Modifying AGCAT Permissions*** on page **2-6** for details).
User Administrator	User can access all functions within the AGent User Administration module (see the ***Agent User Administration User Guide*** for details).
UDMM Admin	User can view, edit and delete bibliographic record notes created by *any* UDMM user (see the ***AGent UDMM Administration User Guide*** for details).
UDMM Notes	User can add cataloging notes to bibliographic records in a union database, and view notes created by other UDMM users (see the ***AGent UDMM Administration User Guide*** for details).
UDMM Merge	User can merge and de-duplicate bibliographic records in a union database (see the ***AGent UDMM Administration User Guide*** for details).
Statistics	User can access the **Statistics** module to view Database Statistics (user *must* also be assigned to the **Staff User** Group ID) and/or ILL Statistics (user *must* also be assigned to the **ILL Staff** Group ID). Initially, the user is *not* granted access to *any* specified statistics report. When you save the record, you are given the opportunity to select the *specific* statistics reports to which the user will be granted access (see ***Modifying Statistics Permissions*** on page **2-11** for details).

- A checkmark ☑ indicates the user *is* assigned to the associated user group.
- An empty checkbox ☐ indicates the user *is not* assigned to the associated user group.
- Clicking a checkbox repeatedly will toggle it on and off.

3. Enter a name for the new user in the **Username or Barcode** text box.

- The **Username or Barcode** can contain *any* combination of alphabetic and/or numeric characters, and the underscore character "_". *Do not* include spaces in the **Username or Barcode**.

Each user must be assigned a *unique* **Username or Barcode**. If you attempt to add a user with a **Username or Barcode** that *already* exists in your library's user database, the message "This Username has already been used. Please use another." displays at the top of the screen when you save the user record.

4. Enter a password for the new user in the **Password** and **Confirm Password or PIN** text boxes.

- The **Password** can contain *any* combination of alphabetic and/or numeric characters, and the underscore character "_". *Do not* include spaces in the **Password**. **Enter the password in *exactly* the same way in both text boxes.**

> If you do not enter the password *identically* in both the **Password** and **Confirm Password or PIN** text boxes, a dialog displays the message "Passwords do not match. Please reenter." when the record is saved. Click the **OK** button on the dialog to close the message, and reenter the password in the **Password** and **Confirm Password or PIN** text boxes.

- If desired, you may enter the *default* password "USERPASS" or "STAFFPASS". Upon logging into AGent for the *first time*, the user will be required to provide a *permanent password* of their own choosing to complete the login process.

5. If appropriate, enter a reminder question related to the user's password in the **Reminder Question** text box.

> In the event a user forgets their password, they may request that their reminder question be e-mailed to them to provide a hint as to their password. When a reminder question is entered in the user record, *be sure* to include an e-mail address for the user in the **E-mail Address** text box (see step 7, below).

6. Enter the user's first name, middle initial, and last name in the **First Name**, **Middle Initial** and **Last Name** text boxes.

> If you enter the user's *full* middle name in the **Middle Initial** text box, the system will truncate the name to show the middle initial *only* when the record is saved.

7. Enter the mailing address for the user using the **Address1**, **Address2**, **City, Zip** and **Country** text boxes, and the **State** drop-down menu.
8. Enter the e-mail address, telephone number(s) and fax number for the user in the **E-Mail**, **Home Phone**, **FAX**, **Mobile Phone** and **Work Phone** text boxes.
9. Enter the user's Social Security Number and date of birth in the **SSN** and **Date of Birth** text boxes.
10. If desired, enter any additional information related to the user in the **Notes** text box.
11. If your library has enabled the *optional* "ILL Request Limits" feature (see the ***AGent ILL Administration User Guide*** for more information), select the category to which you wish to assign the user from the **Patron Category** menu.
12. If your library limits access to certain Resources based on Patron Group assignment, select the group to which you wish to assign the user from the **Patron Group** menu.
13. If your library has enabled the *optional* "Expiration Date" feature, enter the expiration date for the user in the **Expiration Date** text box.

- Enter the **Expiration Date** using the format "MM/DD/YYYY," *including slashes.*

> When the date entered in the **Expiration Date** text box is reached, the user will be *prohibited* from logging into AGent.

14. Select the desired status for the user from the **Account Status** drop-down menu, either **Disable** (account is *inactive*; user *cannot* log into AGent) or **Enable** (account is *active*; user *can* log into AGent).

> The *default* selection for **Account Status** is **Enable**.

15. If the user account will be used simultaneously by *multiple* users, select the **Is an Institution** checkbox.

> The **Is an Institution** feature allows an authenticated user to be identified as an "institution" (a single entity that is used to validate *one or more* individuals affiliated with that institution).

16. When all desired information for the user has been entered, click the **Submit** button to add the new user to your library's database.

    - The status message "User *(Username)* added" displays.

> If you assigned the user to the **ILL Staff**, **CAT Staff** and/or **Statistics** groups(s), a "permissions" screen displays when you submit the record. Modify ILL Permissions, CAT permissions, Authority/Translate preferences and Statistics Permissions as appropriate (see ***Modifying ILL Permissions*** on page **2-5**, ***Modifying AGCAT Permissions*** on page **2-6**, ***Modifying Web HLD Permissions** on page* ***2-8***, ***Modifying Translate/Authority Preferences*** on page **2-10**, or ***Modifying Statistics Permissions*** on page **2-11** as appropriate, for details).

> If you assigned the user to the Patron group, it *may* be necessary to edit the ILL permissions for the user (see ***Configuring ILL Permissions for Patrons*** on page **2-15** for details).

17. Click the **OK** button on the status message to close the message and return to the Add a User Account screen.

18. Repeat steps **2** through **17** to add *additional* users to your library's database. When all desired users have been added, click the **Close** button to close the Add a User Account screen.

> When you add a new *patron* record to your library's database, *default* preferences are applied to the user's record according to the default values specified for the "generic" patron record (see ***Editing Preferences for "Generic" Users*** on page **2-16** for details).

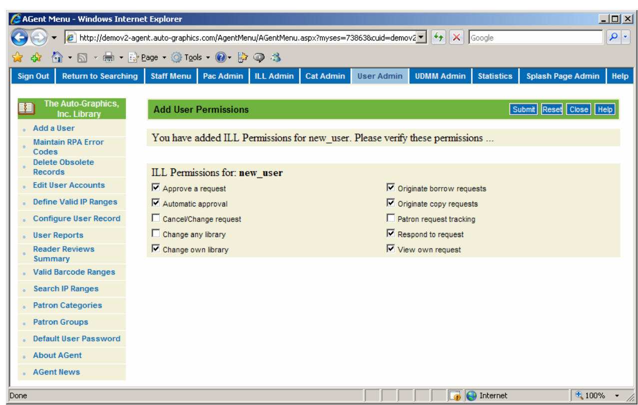
Modifying ILL Permissions

When you add a *new* user and assign **ILL Staff** permissions (see ***Adding a User*** on page **2-1** for details), or when you click the **ILL Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **2-11** for details), the ILL Permissions screen displays. The ILL Permissions screen shows the ILL permissions currently granted to the user. You may grant or deny additional permissions as desired.

To modify ILL permissions:

1. Use the checkboxes to select the permissions you wish to grant to the user.

    - Clicking the checkbox next to a permission will toggle it on and off.
    - A *checkmark* in the checkbox ☑ indicates the user is *granted* the associated permission.
    - An *empty checkbox* ☐ indicates the user is *denied* the associated permission.



ILL Permissions Screen

    - Use the definitions below to determine whether a permission should be granted or denied for a given user.

User Permissions

Permission	Definition
Approve a request	Allows the user to process requests while in Awaiting Approval status for electronic submission to lenders.
Automatic approval	Automatically sends requests to the first lender when the user submits an ILL request using AGent's Interlibrary Loan functions or the Blank Request Form.
Cancel/Change request	Allows the user to cancel a request made as a Borrower, or to update fields on a request made as a Borrower.
Change any library	Allows the user to update any participant library record; allows the user to access the Reports and Download feature for any library. *This permission should be reserved for System Administrators only.*
Change own library	Allows the user to update the participant record for their own library; allows the user to access the Reports and Download feature for their own library. *This permission should be reserved for System or Library Administrators only.*
Originate borrow requests	Allows the user to create and submit borrow requests using AGent's Interlibrary Loan functions or the Blank Request Form.
Originate copy requests	Allows the user to create and submit photocopy requests using AGent's Interlibrary Loan functions or the Blank Request Form.
Patron request tracking	Allows library patrons to view the status of their own ILL requests from an AGent station.
Respond to request	Allows the user to process ILL requests.
View own request	*This permission is obsolete.*

2. When all desired changes to ILL permissions have been made, click the **Submit** button to save your changes.

Modifying AGCAT Permissions

AGCAT Permissions are available *only* if your library has purchased the *optional* AGCat module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **2-1** for details), the CAT Permissions screen displays automatically when you submit the new user record. When you click the **CAT Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **2-11** for details), the CAT Permissions screen displays.

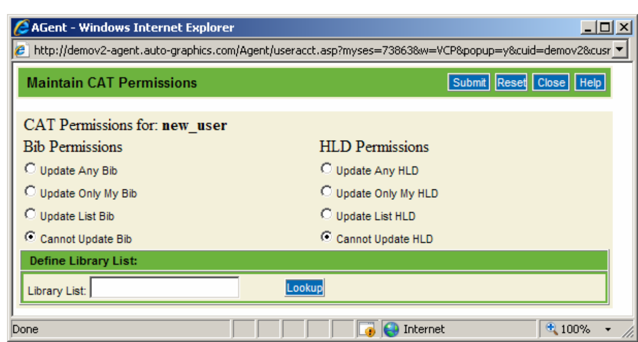
The CAT Permissions screen shows the CAT permissions currently granted to the user when performing cataloging maintenance functions using AGCat (see the ***AGent AGCat Client User Guide*** for details). CAT Permissions determine the specific cataloging functions the user can perform within the Union database. CAT Permissions determine the type of information the user can upload to the database (bibliographic and/or holdings) and the libraries for which the user can perform database maintenance (their library *only*, selected libraries or all libraries).

You may change CAT Permissions as desired.

To modify CAT Permissions:

If *any* bibliographic update permission is granted, a holding update permission *must* also be granted.

1. Use the radio buttons to select the permissions you wish to grant to the user.



CAT Permissions Screen

- Use the definitions below to determine whether a permission should be granted or denied for a given user.

> Depending on the CAT Permissions currently granted to your *library* (by the Customer SuperUser for your consortium or collective), some permissions may not be available for assignment to library staff members.

Bib Permissions:

- **Update Any Bib** - Can upload new/edited bibliographic information or delete bibliographic records for *any* library.
- **Update List Bib** - Can upload new/edited bibliographic information or delete bibliographic records for multiple *selected* libraries *only* (for bibliographic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).
- **Update Only My Bib** - Can upload new/edited bibliographic information or delete bibliographic records for your library *only* (for bibliographic records to which your library is the *only* holder attached).
- **Cannot Update Bib** - Cannot upload new/edited bibliographic information or delete bibliographic records for *any* library.

HLD Permissions:

- **Update Any HLD** - Can upload added/edited/deleted holdings (locations) information for *any* library.
- **Update List HLD** - Can upload added/edited/deleted holdings (locations) information for multiple *selected* libraries *only* (for bibliographic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).
- **Update Only My HLD** - Can upload added/edited/deleted holdings (locations) information for your library *only* (for bibliographic records to which your library is the *only* holder attached).
- **Cannot Update HLD** - Cannot upload added/edited/deleted holdings (locations) information for *any* library.

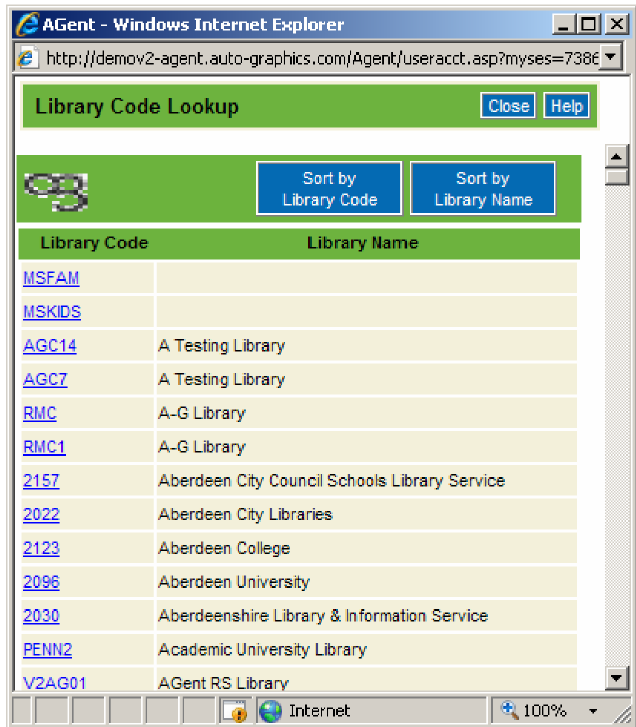
2. If the **Update List Bib** or **Update List HLD** option is selected for *either* the **Bib Permissions** or **HLD Permissions**, enter the library codes for which the user may perform database updates in the **Library List** text box.

> If your *library* has been granted **Update Any Bib** or **Update Any HLD** permissions (see the ***AGent Customer SuperUser User Guide*** for details), the **Library List** option is available. If your *library* has been granted **Update List Bib** *and* **Update List HLD** permissions *only*, the **Library List** field is *read-only*, and contains the library codes for which you library is authorized to perform cataloging maintenance functions (as established by the Customer SuperUser for your consortium or collective).

> AGent uses the *same* **Library List** for both the bibliographic update permission and the holding update permission (when the **by Library codes** option is selected). You *cannot* specify a *different* **Library List** for bibliographic and holding update permissions.

- Enter the library codes for the libraries for which the user may perform database updates in the **Library List** text box. Separate multiple library codes with commas. *DO NOT* use spaces in the **Library List**.
- If desired, click the **Lookup** button to use the Lookup feature to locate the desired Library Codes:

- The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
- Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
- Click the **Sort by Library Name** button to sort the list alphabetically by library name.
- Click the **Library Code** for a library you wish to add to the **Library List**. The selected code is *automatically* added to the list. Select additional codes as desired.
- When all desired libraries have been selected, click the **Close** button to close the Library Code Lookup window and return to the CAT Permissions screen.



Library Code Lookup Screen

3. When all desired changes to CAT Permissions have been made, click the **Submit** button to save your changes.

Modifying Web HLD Permissions

Web HLD Permissions are available only if your library has purchased the *optional* CAT Administration module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **2-1** for details), the Web HLD Permissions screens display automatically when you submit the new user record. When you click the **Web HLD Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **2-11** for details), the Web HLD Permissions screen displays.

The Web HLD Permissions screen shows the permissions currently granted to the user when performing locations (holdings) maintenance functions using AGent CAT Administration (see the ***AGent CAT Administration User Guide*** for details). Web HLD Permissions determine the libraries for which the user can perform locations maintenance (their library *only*, selected libraries or all libraries).

You may change Web HLD Permissions as desired.

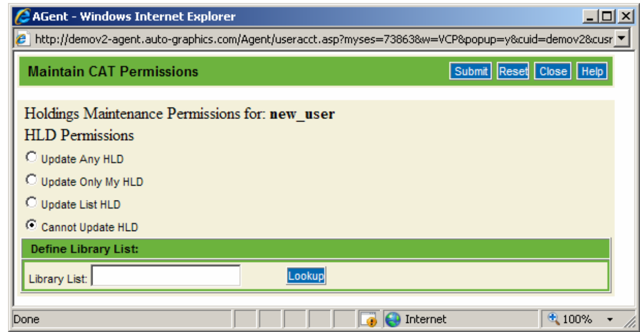
To modify HLD Permissions:

1. Use the radio buttons to select the permissions you wish to grant to the user.
   - Use the definitions below to determine whether a permission should be granted or denied for a given user.

Depending on the HLD Permissions currently granted to your *library* (by the Customer SuperUser for your consortium or collective), some permissions may not be available for assignment to library staff members.

HLD Permissions:

- **Update Any HLD** - Can upload added/edited/deleted holdings (locations) information for *any* library.
- **Update List HLD** - Can upload added/edited/deleted holdings (locations) information for multiple *selected* libraries *only* (for bibliographic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).



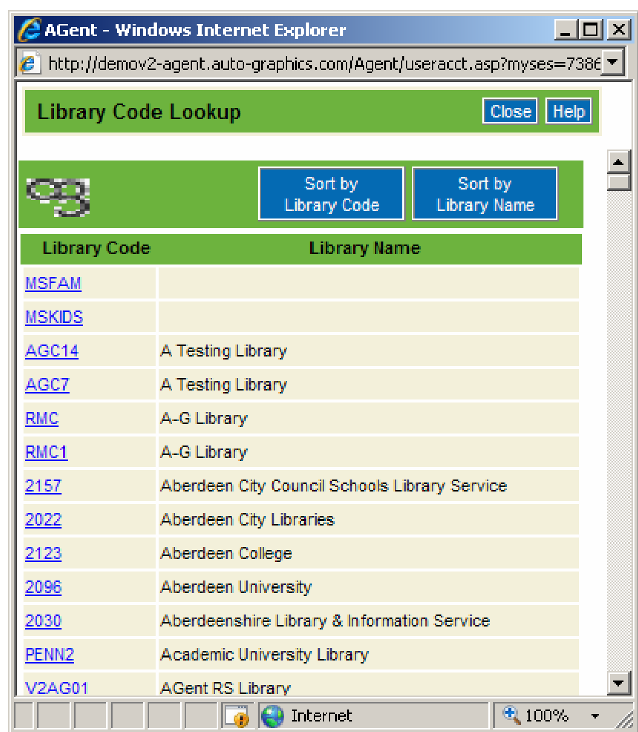
HLD Permissions Screen

- **Update Only My HLD** - Can upload added/edited/deleted holdings (locations) information for your library *only* (for bibliographic records to which your library is the *only* holder attached).
- **Cannot Update HLD** - Cannot upload added/edited/deleted holdings (locations) information for *any* library.

2. If the **Update List Bib** or **Update List HLD** option is selected for *either* the **Bib Permissions** or **HLD Permissions**, enter the library codes for which the user may perform database updates in the **Library List** text box.

> If your *library* has been granted **Update Any HLD** permissions (see the ***AGent Customer SuperUser User Guide*** for details), the **Library List** option is available. If your *library* has been granted **Update List HLD** permissions, the **Library List** field is *read-only*, and contains the library codes for which you library is authorized to perform locations maintenance (as established by the Customer SuperUser for your consortium or collective).

- Enter the library codes for the libraries for which the user may perform database updates in the **Library List** text box. Separate multiple library codes with commas. *DO NOT* use spaces in the **Library List**.
- If desired, click the **Lookup** button to use the Lookup feature to locate the desired Library Codes:
  - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
  - Click the **Sort by Library Code** button to sort the list alphabetically by library code.
  - Click the **Sort by Library Name** button to sort the list alphabetically by library name.



Library Code Lookup Screen

- ○ Click the **Library Code** for a library you wish to add to the **Library List**. The selected code is *automatically* added to the list. Select additional codes as desired.
- ○ When all desired libraries have been selected, click the **Close** button to close the Library Code Lookup window and return to the CAT Permissions screen.

3. When all desired changes to CAT Permissions have been made, click the **Submit** button to save your changes.

Modifying Translate/Authority Preferences

Translate/Authority Preferences are available only if your library has purchased the *optional* Translate/Authority module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **2-1** for details), the Translate/Authority Preferences screen displays automatically when you submit the new user record. When you click the **Edit Translate/Authority Preferences** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **2-11** for details), the Translate/Authority Preferences screen displays.

Authority Preferences are used to configure the authority validation hierarchy for the user. The authority validation hierarchy determines the order in which authority records are searched during authority control processing (see the ***AGent Authority/Translate User Guide*** for details). The validation hierarchy may include records from sources such as the Library of Congress, National Library of Canada, Medical Subject Headings, etc.

During authority control processing, AGent searches authority records from the top of the validation hierarchy down, until a match is found. When a match for a bibliographic heading is found in an authority record at the top of the validation hierarchy, the bibliographic heading is flagged as "**VALIDATED**" and the remaining authority records are not searched.

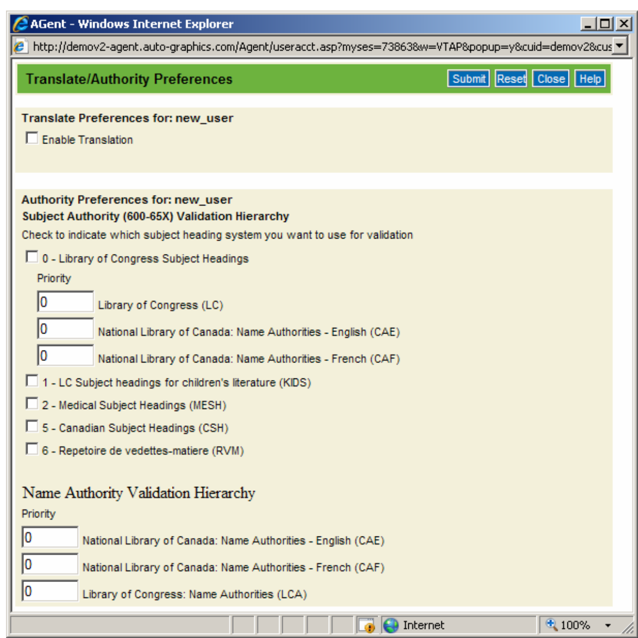
Translate Preferences are used to enable or disable Translation functionality for the user.

To modify Authority/Translate preferences:

1. Use the **Enable Translation** checkbox to set Translate preferences for the user.
   - A *checkmark* indicates the user *is* enabled to use Translation.
   - An *empty checkbox* indicates the user *is not* enabled to use Translation.
   - Clicking the checkbox repeatedly will toggle it on and off.

Translation functionality is not currently implemented.

2. Use the **Subject Authority (600-65X) Validation Hierarchy** checkboxes to select the authority files you wish to use for "subject" validation.



Translate/Authority Preferences Screen

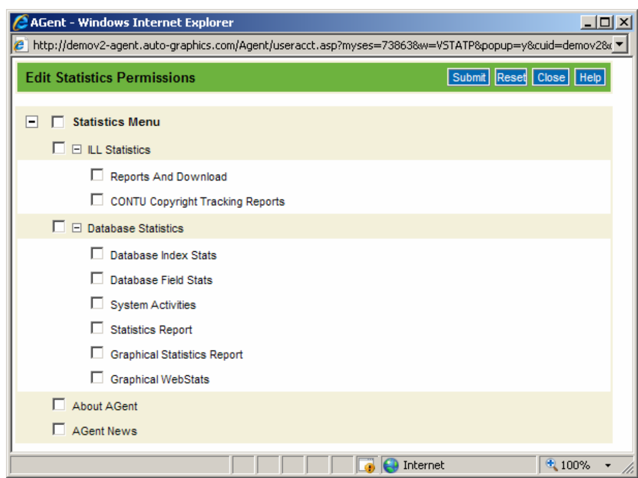
- A *checkmark* indicates the associated authority file *will be* used for subject validation.
- An *empty checkbox* indicates the associated authority file *will not be* used for subject validation.
- Clicking a checkbox repeatedly will toggle it on and off.

3. If the **Library of Congress Subject Headings** option has been selected, use the **Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."
   - You must enter a *unique* preference number in *each* **Priority** text box.
4. Use the **Name Authority Validation Hierarchy – Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."
   - You must enter a *unique* preference number in *each* **Priority** text box.
5. When all desired changes to authority/translate preferences have been made, click the **Submit** button to save your changes.

Modifying Statistics Permissions

When you add a *new* user and assign **Statistics** permissions (see ***Adding a User*** on page **2-1** for details), or when you click the **Statistics Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **2-13** for details), the Statistics Permissions screen displays. The Statistics Permissions screen shows the Statistics permissions currently granted to the user. You may grant or deny additional permissions as desired.

To modify Statistics permissions:



Statistics Permissions Screen

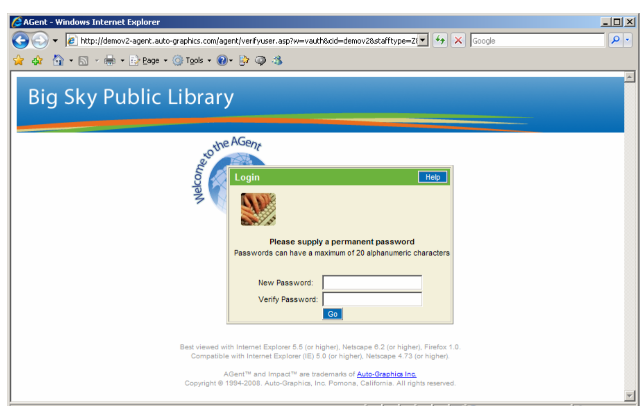
- Click the icon next to the **Statistics Menu** heading to view a hierarchical listing of all submenus, features and functions available within the module. (Click the next to the **Statistics Menu** heading to close the listing.)
  - Click the next to a submenu name to view a hierarchical listing of all features and functions available within the submenu. (Click the icon next to the submenu name to close the listing.)
- Permissions granted to the current user are indicated by a checkmark next to the permission name.
- Use the checkboxes associated with each submenu, feature and function to grant or deny access to the function. A checkmark indicates the user is granted the associated permission; an empty checkbox indicates the user is denied the associated permission.
  - To grant a user access to a submenu, feature or function within the Statistics module, you *must* select the **Statistics Menu** checkbox. To grant a user access to a feature or function within a given submenu, you must select the checkbox for the associated submenu.
- Use the following definitions to determine whether a permission should be granted or denied for a given user.

Permission	Definition
Ill Statistics	Allows the user to view the **ILL Statistics** submenu. User may be selectively granted permissions for the following functions:
Reports and Download	Allows the user to generate ILL activity reports (borrowing activity, lending activity, net activity), and download request records and/or lender response records.
CONTU Copyright Tracking reports	Allows the user to generate reports related to Copyright Tracking.
Database Statistics	Allows the user to view the **Database Statistics** submenu. User may be selectively granted permissions for the following functions:
Database Index Stats	Allows the user to view and download general statistics (index statistics, qualifier statistics and holdings statistics) for the Union catalog.
Database Field Stats	Allows the user to view general information related to the number of bibliographic and locations (holdings) record in your library's AGent VERSO database, and detailed MARC Field statistics for the entire database for your library.
Locations Collections	Allows the user to view the number of items in your AGent VERSO database that are associated with a selected library, branch or collection. **Locations Collections** statistics are available for AGent VERSO systems *only*.
System Activities	Allows the user to view summary information related to your library's AGent system for a specified report period; displayed statistics include login data, search data, ILL request data and cataloging data.
Statistics Report	Allows the user to generate detailed statistics reports based on user-specified parameters.
Graphical Statistics Report	Allows the user to view summary information related to your library's AGent system for a specified report period in a graphical format; available statistics include login data, search data, ILL request data and cataloging data.
Graphical Webstats	Allows the user to view detailed Web statistics related to the access and use of your library's AGent system.
About AGent	Allows the user to view the About AGent page.
AGent News	Allows the user to view the AGent "News" page.

- When all desired submenus, feature and functions have been selected, click the **Submit** button to submit your changes to Statistics permissions.

Setting the Default User Password

AGent lets you pre-configure the User Record with a *default* user password to be applied to all *new* user records (patron and staff) that are created in the User Administration module. Additionally, AGent supports the use of two *specialized* default password, "USERPASS" and "STAFFPASS." When a user assigned the password "USERPASS" or "STAFFPASS" logs into AGent for the *first time*, the Permanent Password screen displays. The user *must* provide a permanent password to complete the login process.



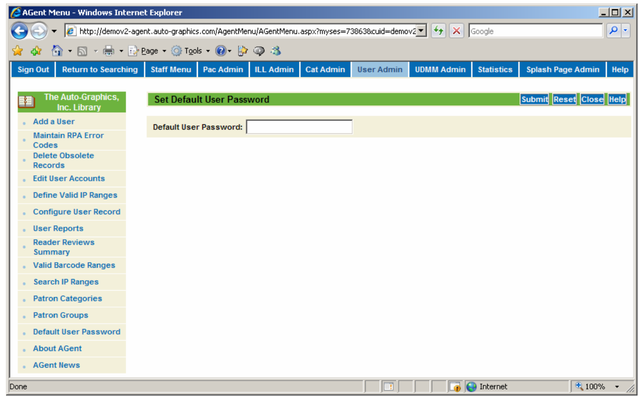
Permanent Password Screen

It is recommended that *only* the password "USERPASS" or "STAFFPASS" by used as the *default* user password. Use of *any* other password *will not* trigger display of the Permanent Password screen.

To set the default user password:

1. From the **User Administration** menu, select **Default User Password**.
   - The Set Default User Password screen displays.
2. Enter the desired default user password in the **Default User Password** text box.
3. Click the **Submit** button to save your changes.

The specified **Default User Password** will be applied to all *new* user records (patron and staff) that are created in the AGent User Administration module.



Set Default User Password Screen

The default user password will display in the **Password** and **Confirm Password or PIN** fields of the Add a User Account screen (see ***Adding a User*** on page **2-1** for details) as a series of asterisks.

Editing User Accounts

You can edit the user record for *any* current authenticated user for your library *only*.

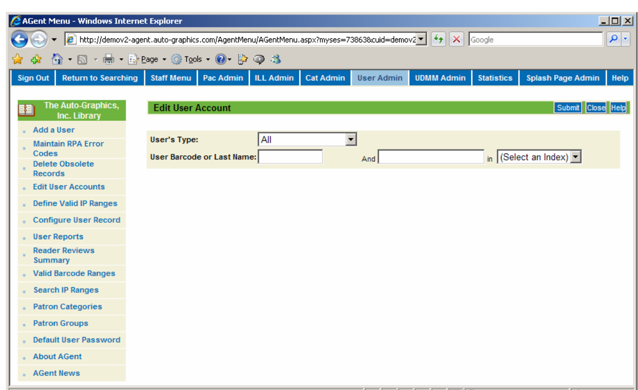
You *cannot* change the **Username or Barcode** for a current authenticated user.

Viewing the User Account List

The User Account List shows *all* current authenticated users for your library, in alphabetic order by **Name** (last name first), and includes the **User Name**, **Name** and **User Type** (user group assignments) for each user. *Disabled users* are indicated by a red asterisk "*" following the **User Name**. From the User Account list, you may choose to edit the record for a current authenticated user (see ***Editing User Records*** on page **2-13** for details) or delete an authenticated user from your library's database (see ***Deleting Users*** on page **2-21** for details).

To view the User Account list:

1. From the **User Administration** menu, select **Edit User Accounts**.
   - The Edit User Account Search Screen displays.
2. Enter the desired search criteria:
   - To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Type** menu, then click the **Search** button.



Edit User Account Search Screen

- ○ Select **All** to display users for *all* user groups.
- ○ Select Patron or the desired staff mode (PAC Admin, ILL Admin, etc.) to display users for the associated mode.

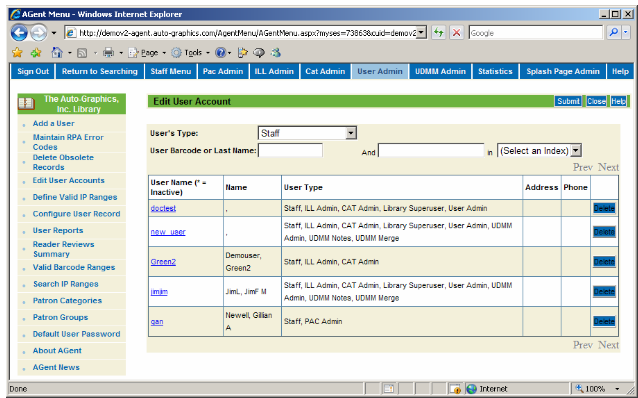
- To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Type**, leave the **User Barcode or Last Name** text box *blank*.

When searching by a user's name, you may enter a *complete* or *partial* last name.

- To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.

3. Click the **Submit** button to submit your search of the user database.

   - The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.
   - Use the **Prev** and **Next** links to view other pages of the list.



User Account List

The **Prev** and **Next** links are active *only* if your library's user database contains *more than 20* users.

Editing User Records

You can edit the user records for authenticated users for your library *only*.

To edit a user record:

1. Access the User Account list, and locate the user for whom you wish to edit the user record (see ***Viewing the User Account List*** on page **2-13** for details).

If a user account for the desired user *does not exist*, select **Add a User** from the **User Administration** menu to add a new user record. The Add a User Account screen displays in an *additional* browser window (see ***Adding a User*** on page **2-1** for details).

2. Click the **User Name** link for the desired user.

   - The Edit User Account screen displays in an *additional* browser window.
   - The Edit User Account screen is pre-filled with the current data for the associated user.

3. Add, change or delete information as desired (see ***Adding a User*** on page **2-1** for details).

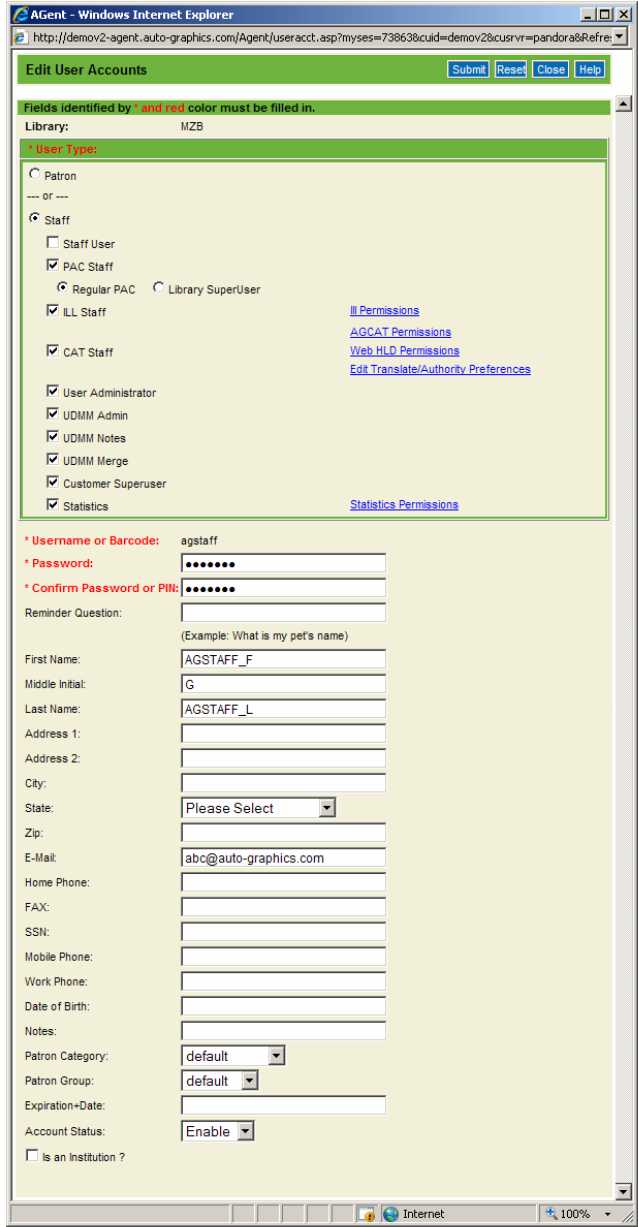
Depending on the specific configuration of AGent for your library or consortium, some User Record fields *may not* be available.

- Click the **ILL Permissions** link to modify ILL permissions for the user (see ***Modifying ILL Permissions*** on page **2-5** for details).
- Click the **AGCAT Permissions** link to modify cataloging permissions for the user when using AGCAT (see ***Modifying AGCAT Permissions*** on page **2-6** for details).
- Click the **Web HLD Permissions** to modify locations (holdings) permissions for the user when using AGent CAT Administration (see ***Modifying Web HLD Permissions*** on page **2-8** for details).
- Click the **Edit Translate/Authority Preferences** link to configure the authority validation hierarchy and enable or disable Translation functionality for the user when using AGent's *optional* Translate/Authority module (see ***Modifying Translate/Authority Preferences*** on page **2-10** for details).
- Click the **Statistics Permissions** link to modify Statistics permissions for the user (see ***Modifying Statistics Permissions*** on page **2-11** for details).

4. When all desired changes have been made, click the **Submit** button to submit your changes to the user record.

- The Edit User Account screen closes *automatically*.

5. Repeat steps **2** through **4** to edit *additional* users.



Edit User Account Screen

Configuring ILL Permissions for Patrons

If your library participates in Interlibrary Loan, you may wish to allow library patrons to submit ILL requests, and to track the progress of their in-process requests. The "generic" patron account (see ***About AGent Users*** on page **2-1** for details) lets you enable or disable Interlibrary Loan permissions for *unauthenticated* patrons. Additionally, when you add an *authenticated* patron to your library's user database, the patron *automatically* "inherits" the Interlibrary Loan permissions assigned to the "generic" patron. If you wish to change the Interlibrary Loan permissions for a given *authenticated* patron, you must edit the permissions manually.

To configure ILL permissions for patrons:

1. From the User Account List (see ***Viewing the User Account List*** on page **2-13** for details), click the **Username** link for the user for whom you wish to edit ILL Permissions (to edit ILL permissions for *unauthenticated* users, select the **Username** "patron").
   - The Edit User Account screen displays in an *additional* browser window.
2. Click the **ILL Permissions** link.
   - The ILL Permissions screen displays in an *additional* browser window.
3. Use the checkboxes to select the permissions you wish to grant to the user.
   - Clicking the checkbox next to a permission will toggle it on and off. A checkmark in the checkbox ☑ indicates the user is *granted* the associated permission. An empty checkbox ☐ indicates the user is *denied* the associated permission.
   - To allow the user to submit *borrow* requests, select the **Originate borrow requests** checkbox.
   - To allow the user to submit *copy* requests, select the **Originate copy requests** checkbox.
   - To allow the user to track their in-process ILL requests, select the **Patron request tracking** checkbox.
4. Click the **Submit** button on the ILL Permissions screen to save your changes.
   - The ILL Permissions screen closes *automatically*.
5. Click the **Close** button on the Edit User Account screen.

Editing Preferences for "Generic" Users

Agent is configured with "generic patron" and "generic guest" user records. These records let you configure a number of system defaults for *unauthenticated* users that access your library's AGent system as either a "generic patron" or as a "guest." In addition to the editing functions available with all user records (see ***Editing User Accounts*** on page **2-11** for details), you may also edit the "generic patron" and "generic guest" user records to:

- Set general user preferences
- Set favorite search sources
- Set display/hide search source options

Editing User Preferences

The **Edit Preferences** feature lets you easily configure a number of system options for the "generic patron" or "generic guest" user. You may also add up to five Web Links to the **Resources** menu for the users. The **Edit Preferences** feature is accessed from the Edit User Accounts screen for the desired user.

Depending on the configuration of AGent for your library or consortium, some options may not be available.

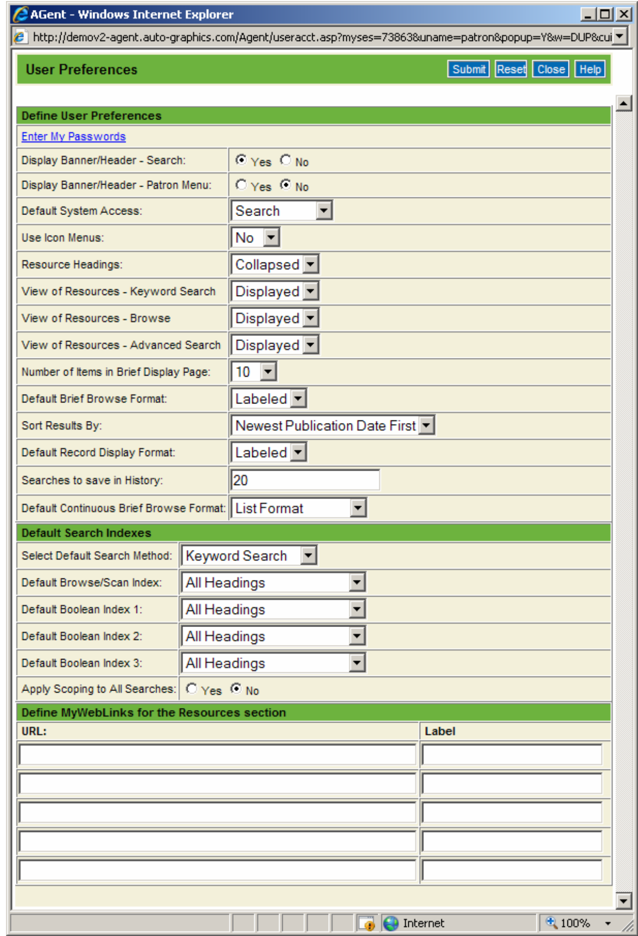
To edit user preferences:

1. Click the **Edit Preferences** link at the bottom of the Edit User Account screen for the "generic patron" or "generic guest" user (see ***Editing User Records*** on page **2-13** for details).

- The User Preferences screen for the associated user displays in an *additional* browser window.

2. Use the options in the **Define User Preferences** field to configure *general* preferences for AGent:

> The **Enter My Passwords** function *is not* intended for use with the generic patron or generic guest record. *Do not* enter values for this option.



Typical User Preferences Screen

- Select the desired display language for the AGent Search interface from the **Select Default Language** menu.
  - The **Select Default Language** menu lists *all* display languages available through your library or consortium.
- Use the **Display Banner/Header - Search** options to enable or disable display of the library or consortium banner on all screens in the AGent Search interface.
  - Select the **Yes** (banner/header *will* be displayed) or **No** (banner/ header *will not* be displayed) radio button, as desired.
- Use the **Display Banner/Header - Patron Menu** options to enable or disable display of the library or consortium banner on the **Patron Menu** screen.
  - Select the **Yes** (banner/header *will* be displayed) or **No** (banner/header *will not* be displayed) radio button, as desired.
- Select the desired default system access display from the **Default System Access** menu.
  - The **Default System Access** selection determines the screen that displays when the user *first* logs in to AGent. Select **Search** to display the *default* search screen set for the user when the user logs in to AGent. Select **Patron Menu** to display the Patron Menu when the user logs in to AGent.
- Use the **Use Icon Menus** option to enable or disable the "icon-based" toolbar in the AGent search interface.
  - Select **Yes** to use the "icon-based" toolbar. Select **No** to use the "text-based" toolbar.
- Select the desired display format for search sources in the **Resources** menu on all AGent search screens from the **Resource Headings** menu.
  - Select **Collapsed** to display the resource headings only in the **Resources** menu (clicking a heading name displays the individual search sources under the heading).
  - Select **Expanded** to display the individual search sources under *each* resource heading in the **Resources** menu.

- Use the **View of Resources** menus to "display" or "hide" the **Resources** menu on the AGent **Keyword Search**, **Browse** and **Advanced Search** screens.
    - Select **Displayed** to display the **Resources** menu on the associated AGent search screen.
    - Select **Hidden** to hide the **Resources** menu on the associated AGent search screen. (The **Resources** menu can be *selectively* displayed at any time by clicking the **Display the Resources of (*library name*)** link on any AGent search screen for which the **Resources** have been hidden.)
- Select the number of search results (items) to be shown on *each page* of Title Lists, Term Lists and Number Lists from the **Number of Items in Brief Display Page** menu; either **10**, **20**, **30**, **40**, **50** or **100**.
- Select the desired default display format for Title Lists from the **Default Brief Browse Format** menu; either **List** or **Labeled**.
- Select the desired default sort order for search results (Title Lists) from the Sort Results By menu; either **Newest Publication Date First**, **Newest Publication Date Last**, **Newest Record First**, **Newest Record Last**, **Alphabetically by Title**, **Alphabetically by Author**, **Number of Locations/Title**, **LC Call Number/Title**, **Dewey Call Number/Title**, **Local Call Number/Title**, **URL** or **Relevancy**.
- Select the desired default display format for Full Record Displays from the **Default Record Display Format** menu; either **Card**, **Labeled** or **MARC**.
- Enter the number of searches to be saved in the user's Search History in the **Searches to save in History** text box.
    - You may specify to save from **0** to **50** searches.
- Select the desired default Continuous Brief Browse display format from the **Default Continuous Brief Browse Format** menu; either **Thumbnail Format** or **List Format**.

3. Use the options in the **Default Search Indexes** field to configure *search* preferences for AGent:

- Select the desired default search method from the **Select Default Search Method** menu; either **Keyword Search**, **Browse** or **Advanced Search**.
    - Your default search method determines the AGent search screen that displays when you *initially* login to AGent.
- Select the desired default search index for **Browse** searches from the **Default Browse/Scan Index** menu.
    - The **Default Browse/Scan Index** menu lists all indexes supported by your library's AGent system.
- Select the desired default search indexes for **Advanced Search** searches from the **Default Boolean Index 1**, **Default Boolean Index 2** and **Default Boolean Index 3** menus.
    - The **Default Boolean Index 1**, **Default Boolean Index 2** and **Default Boolean Index 3** menus list all indexes supported by your library's AGent system.
- Indicate whether or not scoping will be applied to *all* searches using the **Apply Scoping to All Searches** radio buttons.
    - Select the **Yes** radio button to apply the user's scoping selection to *all* searches (Keyword Search, Browse, Advanced Search). Select the **No** radio button to apply the user's scoping selection to Advanced Search *only*.

4. If desired, use the **Define MyWebLinks for the Resources section** to add up to *five* personalized Web Links to the **Resources** menu for the user.

> Personal Web Links are displayed at the top of the **Resources** menu under the heading **My Web Links**.

- Enter the *full* Uniform Resource Locator (including **http://**) for the desired Web Link in the **URL** text box.
- Enter a name for the web link in the associated **Label** text box.

> The **Label** can include alphabetic and numeric characters and spaces. The **Label** may be a *maximum* of 50 characters in length, *including* spaces.

5. Once all desired preference have been specified, click the **Submit** button to submit your changes.

- The User Preference screen closes *automatically*.

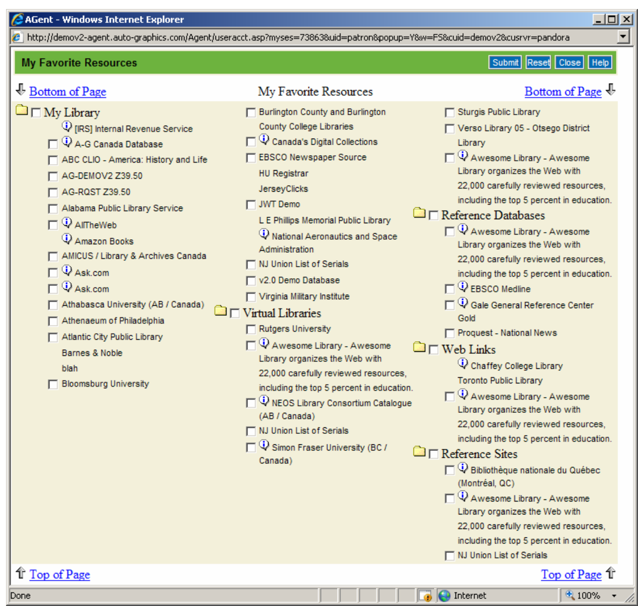
Editing Favorite Search Sources

Use the **Edit Favorite Search Sources** function to select and save favorite search sources for the "generic patron" or "generic guest" user from a list of *all search sources* available through your library. Each time a user accesses AGent as an unauthenticated patron or as a guest, the favorite search sources are *automatically* selected in the **Resources** menu of each AGent search screen. If the user makes changes to the **Resources** selected for a given search, the favorite search sources can be restored by clicking the **Reset** button.

To edit favorite search sources:

1. Click the **Edit Favorite Search Sources** link at the bottom of the Edit User Account screen for the "generic patron" or "generic guest" (see ***Editing User Records*** on page **2-13** for details).

- The Favorite Search Sources screen displays in an *additional* browser window. The screen lists *all* search sources available to you through your library.
- Databases are organized under *source headings* (category groupings) such as **My Library**, **Union Libraries**, **Web Resources**, etc.. Source headings are shown in **bold** type, and are indicated by a icon.



Favorite Search Sources Screen

2. Use the search source checkboxes to select/deselect the desired favorite search sources:

- A *checkmark* ☑ indicates the associated search source is *selected* (will be included as a favorite search sources).

- An *empty checkbox* ☐ indicates the associated search source is *not selected* (will not be included as a favorite search sources).
- Clicking a checkbox repeatedly will toggle it on and off.

3. To select an *individual search source*, select the checkbox ☐ for the desired search source.
4. To select *all search sources* within a source heading, select the checkbox ☐ for the desired source heading. The checkboxes for *all search sources* under the source heading are selected *automatically*.

> The *maximum* number of search sources that can be selected for any single search was established when your library's Agent system was installed, according to the requirements specified by your library or consortium. If you select *more* than the established *maximum* number of search sources as favorite search sources, a warning dialog displays the message "The maximum number of selected databases per broadcast search for your library is (*number*)." Click the **OK** button on the warning dialog to close the dialog. The *last* search source you selected is *automatically* deselected.

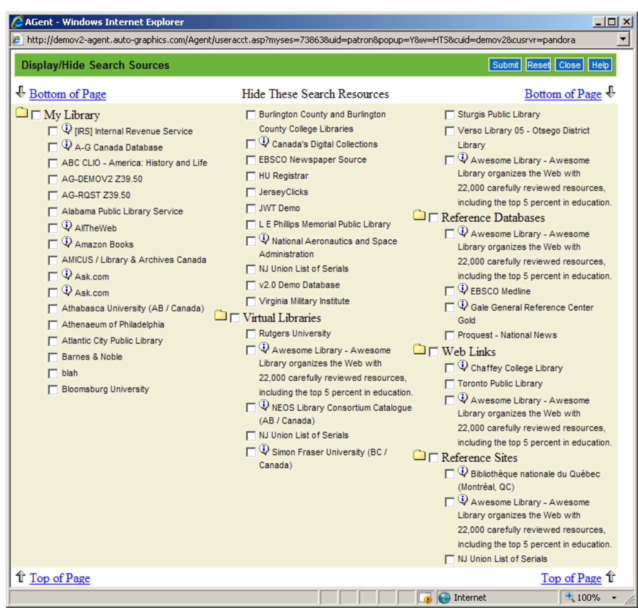
5. When all desired search sources have been selected, click the **Submit** button to save your changes.
   - A confirmation dialog displays the message "Your changes will not be applied until you log back in."
6. Click the **OK** button on the confirmation dialog.
   - The Favorite Search Resources screen closes *automatically.*

Setting Display/Hide Search Source Options

By default, the **Resources** list shown on each AGent search screen lists *all* search sources available to a user through your library. You can use the **Display/Hide Search Sources** function to "hide" selected search sources in the **Resources** list for the “generic patron” and “generic guest” users. Each time a user accesses AGent as an unauthenticated patron or as a guest, all search sources you have selected to "hide" *are not* shown in the **Resources** menu of each AGent search screen.

To "display" or "hide" search sources:

1. Click the **Display/Hide Search Sources** link at the bottom of the Edit User Account screen for the “generic patron” or “generic guest” (see ***Editing User Records*** on page **2-13** for details).
   - The Display/Hide Search Sources screen displays in an *additional* browser window. The screen lists *all* search sources available to you through your library.
   - Databases are organized under *source headings* (category groupings) such as **My Library**, **Union Libraries**, **Web Resources**, etc.. Source headings are shown in **bold** type, and are indicated by a ☐ icon.
2. Use the search source checkboxes to display/hide the desired search sources:



Display/Hide Search Sources Screen

- A *checkmark* ☑ indicates the associated search source is *selected* (will be *hidden* in the **Resources** list on *all* AGent search screens).

- An *empty checkbox* ☐ indicates the associated search source is *not selected* (will be *displayed* in the **Resources** list on *all* AGent search screens).

- Clicking a checkbox repeatedly will toggle it on and off.

3. To select an *individual search source*, select the checkbox ☐ for the desired search source.

4. To select *all search sources* within a source heading, select the checkbox ☐ for the desired source heading. The checkboxes for *all search sources* under the source heading are selected *automatically*.

5. When all desired search sources have been selected, click the **Submit** button to save your changes.

   - A confirmation dialog displays the message "Your changes will not be applied until you log back in.".

6. Click the **OK** button on the confirmation dialog.

   - The My Favorite Search Resources screen closes *automatically.*

Deleting Users

You can delete authenticated users for your library *only*. You *cannot* delete the "generic patron" or "generic guest" users.

To delete a user:

1. Access the User Account list, and locate the user for whom you wish to delete the user record (see ***Viewing the User Account List*** on page **2-13** for details).

2. Click the **Delete** button for the desired user.

   - The message "Continue to Delete (*Username*)?" displays.

3. Click the **OK** button to delete the user. (Click the **Cancel** button to cancel the deletion and return to the Select User Account list.)

   - The User Account list refreshes with the deleted user removed from the list.

4. Repeat steps **2** through **3** to delete *additional* users.

Generating User Reports

The **User Reports** function lets you generate a *customized* listing of *authenticated* users for your library, based on the criteria you specify. Reports may be displayed on-screen, or downloaded (as a tab-delimited file) to a local workstation.

> Customer SuperUsers may generate user reports for *any* single library in the consortium or collective, or a combined report for *all* libraries in the consortium or collective (see the ***AGent Customer SuperUser User's Guide*** for details).

To generate a user report:

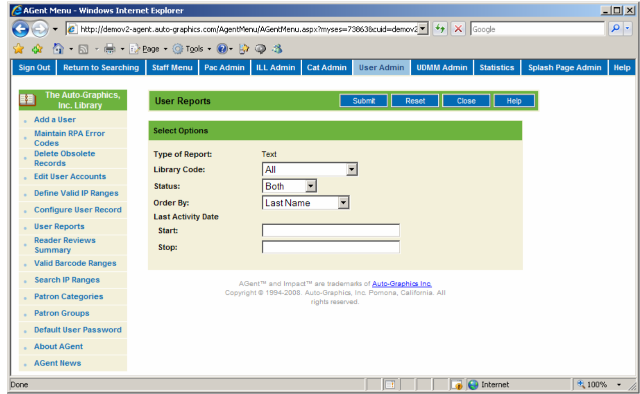
1. From the **User Administration** menu, select **User Reports**.

- The User Reports screen displays.
- The **Library Code** field shows the library code for the library under which you logged in.

2. Select the desired current account status for users you wish included in the report from the **Status** menu; either **Enabled**, **Disabled** or **Both**.

> Account status is set in the User Record for *each* authenticated AGent user (patron or staff member).

- The *default* selection for **Status** is **Both**.



User Reports Screen

3. Select the desired sort order for the report from the **Order By** menu; either alphabetically by **Last Name**, alphabetically by **Username**, chronologically by **Last Activity Date** or alphabetically by **Library Code**.

- The *default* value for **Order By** is **Last Name**.

4. If desired, use the **Last Activity Date** text boxes to limit the report to users who last logged into AGent on a specified day (or range of days).

- Enter dates using the format "MM/DD/YYYY", *including* slashes.
- Enter the start date for the desired last activity date range in the **Start** text box.
- Enter the stop date for the desired last activity date range in the **Stop** text box.
- To limit the last activity date range to a *single* day, enter the *same date* in *both* the **Start** and **Stop** text boxes.

5. When all desired report parameters have been specified, click the **Submit** button to submit your report request.

- The User Report screen displays in an *additional* browser window (see ***Viewing User Reports*** on page **2-22** for details).

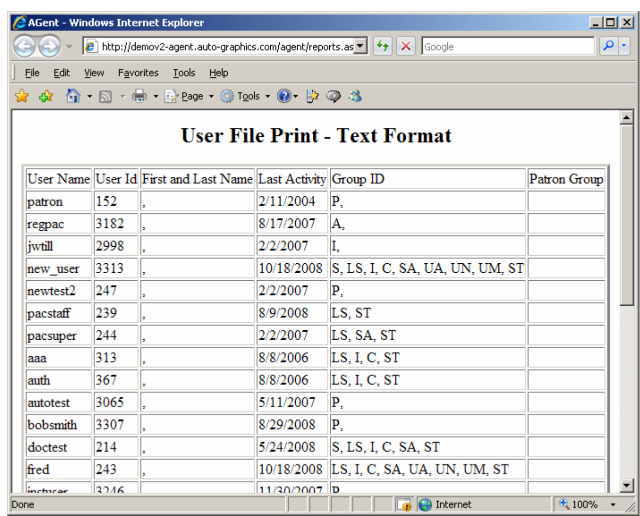
Viewing User Reports

When you submit a report request, the User Report Summary screen displays.

To view the User Report:

The User Report provides the following information:

- **User Name** - The *unique* username assigned to the patron or staff member.
- **User ID** - The system-assigned user identification number for the associated user.


User File Print - Text Format

User Name	User Id	First and Last Name	Last Activity	Group ID	Patron Group
patron	152	,	2/11/2004	P,	
regpac	3182	,	8/17/2007	A,	
jwtill	2998	,	2/2/2007	I,	
new_user	3313	,	10/18/2008	S, LS, I, C, SA, UA, UN, UM, ST	
newtest2	247	,	2/2/2007	P,	
pacstaff	239	,	8/9/2008	LS, ST	
pacsuper	244	,	2/2/2007	LS, SA, ST	
aaa	313	,	8/8/2006	LS, I, C, ST	
auth	367	,	8/8/2006	LS, I, C, ST	
autotest	3065	,	5/11/2007	P,	
bobsmith	3307	,	8/29/2008	P,	
doctest	214	,	5/24/2008	S, LS, I, C, SA, ST	
fred	243	,	10/18/2008	LS, I, C, SA, UA, UN, UM, ST	

Typical User Reports Screen

- **First and Last Name** - The user's first and last name (last name, first name, middle initial).
- **Last Activity** - The most recent date on which the user logged into AGent.
- **Group ID** - The Group ID(s) to which the user is assigned, as follows:
  - **P** - Patron
  - **A** - PAC Staff
  - **I** - ILL Staff
  - **C** - Cat Staff
  - **UA** - UDMM Admin
  - **UM** - UDMM Merge
  - **UN** - UDMM Notes
  - **LS** - Library SuperUser
  - **S** - Staff User
  - **SA** - User Administrator
  - **ST** – Statistics Staff

Managing Patron Categories

AGent provides *two* options for "classifying" library patrons: **Patron Categories** and **Patron Groups.**

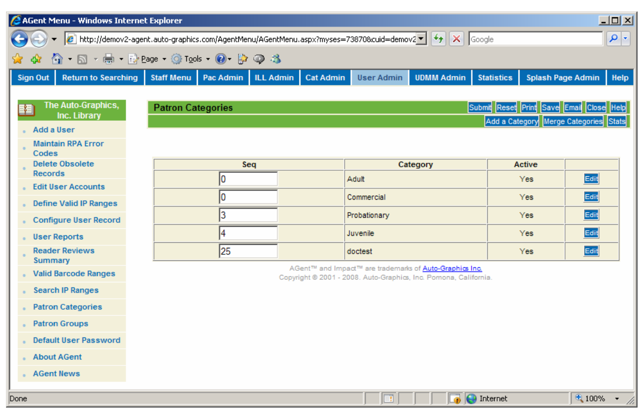
- **Patron Categories** is an *optional* feature used with ILL request Limits. Using **Patron Categories**, you can create *one or more* categories to which patrons may be assigned. Each category is designated an "ILL Request Limit" (the *maximum* number of *active* ILL Requests allowed for a patron assigned to the category) through the ILL Administration module. Library patrons are assigned to Patron Categories through the User Administration module.
- **Patron Groups** lets you create *one or more* groups to which users may be assigned for accessing resources. Access to *specific* resources can be limited to *only* those users associated with a given group. Linking Resources to Patron Groups is accomplished through the PAC Administration module.

To access Patron Categories:

- From the **User Administration** menu, select **Patron Categories**.
  - The Patron Categories screen displays.
  - The Patron Categories screen lists the currently established Patron Categories for your library, and provides the following information for each category:

    Seq - the display sequence for the Patron Category in the **Patron Category** menu on the Add and Edit User Account screens

    Category - the name of the Patron Category



Patron Categories Screen

Active - indicates whether or not the associated Patron Category is currently active (shown in the **Patron Category** menu on the Add and Edit User Account screens); either **Yes** (the associated Patron Category *is* active) or **No** (the associated Patron Category *is not* active)

- From the Patron Categories screen, you may:
  - Set the display sequence for Patron Categories
  - View Patron Category statistics
  - Add a new Patron Category
  - Modify an existing Patron Category
  - Merge *two* Patron Categories into a *single* Patron Category
  - Print a copy of the Patron Categories list
  - Save a copy of the Patron Categories list to your local workstation
  - Email a copy of the Patron Categories list to yourself or to another party

Setting the Patron Category Display Sequence

You can specify the order in which Patron Categories are listed in **Patron Category** menu on the Add and Edit User Account screens.

To set the display sequence:

- On the Patron Categories screen, use the **Seq** text boxes to enter the desired display sequence for each Patron Category.
  - You can enter any number from "**1**" to "**999999**" as a display sequence number.
  - You can enter a *unique* display sequence number for *each* Patron Category, or, you can use *the same* display sequence number for *multiple* Patron Categories.

    > If *the same* display sequence number is used for *more than one* Patron Category, the associated Patron Categories are displayed in *alphabetic order*.

  - You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added Patron Categories between existing Patron Categories without the need to resequence the entire list.
- When display sequence numbers have been entered for *all* listed material types, click the **Submit** button to save your changes.

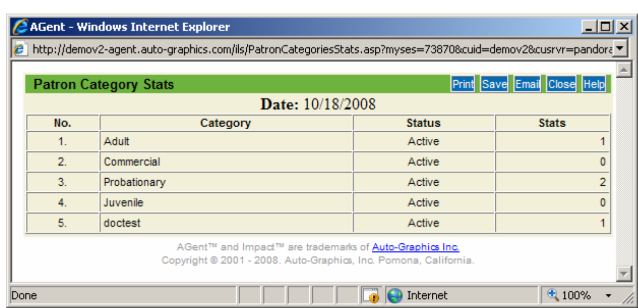
> You *must* enter a display sequence number for *all* listed Patron Categories. If you leave the **Seq** field *blank* for a Patron Category, an advisory message displays when you submit your changes. Click the **OK** button to close the message, and verify a sequence number is entered in *each* **Seq** text box.

Viewing Patron Category Statistics

Patron Category statistics show the number of patrons that are associated with each Patron Category.

To view Patron Category statistics:

- On the Patron Categories screen, click the **Stats** button.
  - The Patron Category Stats screen displays. The date on which the statistics report was requested is shown at the top of the screen.



Patron Category Stats Screen

- The Patron Category Stats screen provides the following information for each Patron Category:
  - **No.** - the display sequence for the material type
  - **Category** - the name of the Patron Category
  - **Status** - indicates whether or not the associated Patron Category is currently **Active** or **Inactive**
  - **Stats** - the *total number* of patrons associated with the Patron Category
- If desired, you may:
  - Print a copy of the Patron Category statistics report
  - Save a copy of the Patron Category statistics report to your local workstation
  - Email a copy of the Patron Category statistics report to yourself or to another party
- Click the **Close** button to close the Patron Category Stats screen and return to the Patron Categories screen.

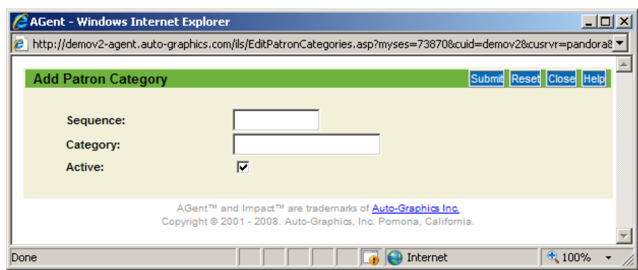
Adding a Patron Category

You can add a *new* Patron Category for your library.

Once a Patron Category has been added to the AGent system, it *cannot* be deleted. If a Patron Category is no longer used by your library and you wish to remove the Patron Category from the **Patron Category** menus throughout the system, you must set the status for the Patron Category to "inactive." Additionally, all patrons associated with the "inactive" category will retain the association, and the ILL limits set for the category while active.

To add a Patron Category:

1. From the Patron Categories screen, click the **Add a Category** button.
   - The Add Patron Category screen displays in an *additional* browser window.
2. Enter the desired display sequence for the Patron Category in the **Sequence** text box.



Add Patron Category Screen

3. Enter a name for the Patron Category in the **Category** text box.

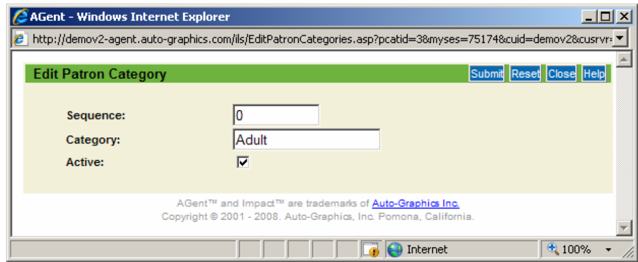
The **Label** *cannot* exceed 50 characters (*including* spaces).

4. Use the **Active** checkbox to set the desired status for the Patron Category:
   - A *checkmark* ☑ indicates the Patron Category is *active* (*is* available in the **Patron Category** menu on the Add and Edit User Account screens). An *empty checkbox* ☐ indicates the Patron Category is *inactive* (*is not* available in **Material Type** menu on the Add and Edit User Account screens). Clicking the checkbox repeatedly will toggle it on and off.
5. Click the **Submit** button on the Add Patron Category screen to submit the new Patron Category. (Click the **Close** button to close the Add Patron Category screen *without* adding the new Patron Category.)
   - The Add Patron Category screen closes *automatically*, and the Patron Categories screen refreshes to display the new Patron Category.

Editing Patron Categories

You can edit a currently defined Patron Category for your library.

To edit a Patron Category:



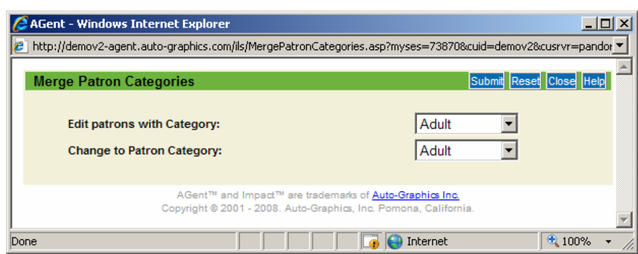
Edit Patron Category Screen

1. On the Patron Categories screen, click the **Edit** button for the desired Patron Category.
   - The Edit Patron Category screen displays in an *additional* browser window. The screen is prefilled with current information for the selected Patron Category.
2. Edit the display **Sequence**, **Category** and **Active** status as desired.
3. Click the **Submit** button on the Edit Patron Category screen to save your changes. (Click the **Close** button to close the Edit Patron Category screen *without* saving your changes.)
   - The Edit Patron Category screen closes *automatically*, and the Patron Categories screen refreshes to display your changes.

Merging Patron Categories

You can combine *two* individual Patron Categories into a *single* Patron Category by merging the contents of one category into another.

To merge Patron Categories:



Merge Patron Categories Screen

1. On the Patron Categories screen, click the **Merge Categories** button.
   - The Merge Patron Categories screen displays in an *additional* browser window.
2. Select the Patron Category you wish to *merge into* another category from the **Edit patrons with Category** drop-down menu.

> The **Edit patrons with Category** menu lists *all* Patron Categories currently defined for your library.

3. Select the Patron Category *into which* you wish to merge the previously selected category from the **Change to Patron Category** drop-down menu.

> The **Change to Patron Category** menu lists *all* Patron Categories currently defined for your library.

4. Click the **Submit** button on the Merge Patron Categories screen to merge the selected Patron Categories. (Click the **Close** button to close the Merge Patron Categories screen *without* merging the selected Patron Categories.)

> *Be sure* to select the Patron Categories you wish to merge in the correct order. Patrons associated with the Patron Category selected in the **Edit patron with Category** menu will be *reassigned* to the Patron Category selected in the **Change to Patron Category** menu.

- The Patron Categories screen refreshes to reflect your changes.

If the "merged" Patron Category (selected from the **Edit patrons with Category** menu) will *no longer* be used by your library, set the status for the Patron Category to "inactive."

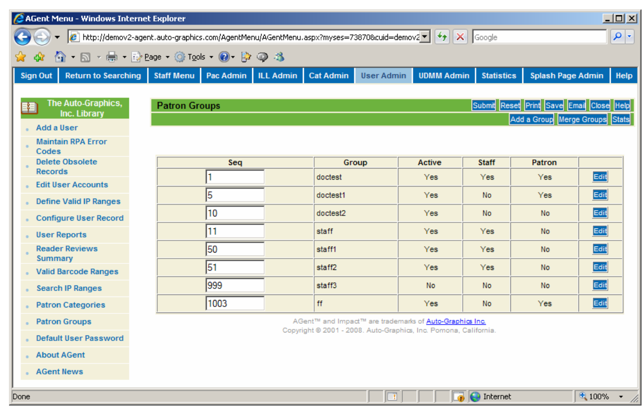
Managing Patron Groups

AGent provides *two* options for "classifying" library patrons: **Patron Categories** and **Patron Groups.**

- **Patron Categories** is an *optional* feature used with ILL Request Limits. **Patron Categories** lets you create *one or more* categories to which patrons may be assigned. Each category is designated an "ILL Request Limit" (the *maximum* number of *active* ILL requests allowed for a patron assigned to the category) through the ILL Administration module. Library patrons are assigned to Patron Categories through the User Administration module.
- **Patron Groups** lets you create *one or more* groups to which users may be assigned for accessing resources. Access to *specific* resources can be limited to *only* those users associated with a given group. Linking Resources to Patron Groups is accomplished through the PAC Administration module.

To access patron groups:

- From the **User Administration** menu, select **Patron Groups**.
  - The Patron Groups screen displays.
  - The Patron Groups screen lists *all* currently defined Patron Groups for your library, and shows the current **Active** status for each group listed: either **Yes** (the associated Patron Group *is* active) or **No** (the associated Patron Group *is not* active).



Patron Groups Screen

- From the Patron Groups screen, you may select to:
  - Set the display sequence for Patron Groups
  - View Patron Group statistics
  - Add a *new* patron group
  - Edit an *existing* patron group
  - Merge *two* Patron Groups into a *single* Patron Group
  - Print a copy of the Patron Groups list
  - Save a copy of the Patron Groups list to your local workstation
  - Email a copy of the Patron Group list to yourself or to another party

Setting the Patron Group Display Sequence

You can specify the order in which Patron Groups are listed in **Patron Group** menus throughout AGent.

To set the display sequence:

- On the Patron Groups screen, use the **Seq** text boxes to enter the desired display sequence for each Patron Group.
  - You can enter any number from "**1**" to "**999999**" as a display sequence number.
  - You can enter a *unique* display sequence number for *each* Patron Group, or you can use *the same* display sequence number for *multiple* Patron Groups.

    If *the same* display sequence number is used for *more than one* Patron Group, the associated Patron Groups are displayed in *alphabetic order*.

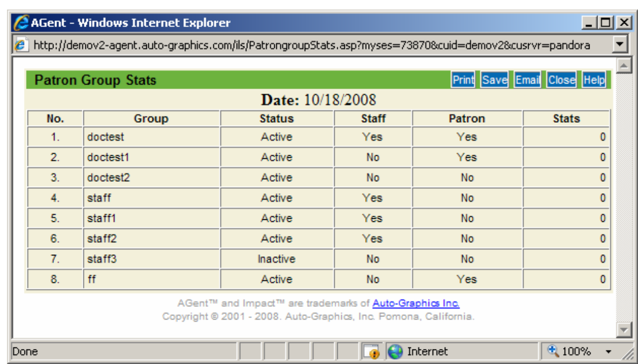
  - You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added Patron Groups between existing Patron Groups without the need to re-sequence the entire list.
- When display sequence numbers have been entered for *all* listed Patron Groups, click the **Submit** button to save your changes.

  You *must* enter a display sequence number for *all* listed Patron Groups. If you *do not* enter a display sequence number for a given Patron Group, the display sequence value for the Patron Group will revert to "1" when you submit your changes.

Viewing Patron Group Statistics

Patron Group statistics show the current number of patrons assigned to *each* Patron Group.

To view Patron Group Statistics:



No.	Group	Status	Staff	Patron	Stats
1.	doctest	Active	Yes	Yes	0
2.	doctest1	Active	No	Yes	0
3.	doctest2	Active	No	No	0
4.	staff	Active	Yes	No	0
5.	staff1	Active	Yes	No	0
6.	staff2	Active	Yes	No	0
7.	staff3	Inactive	No	No	0
8.	ff	Active	No	Yes	0

Patron Group Statistics Screen

- On the Patron Groups screen, click the **Stats** button.
  - The Patron Group Statistics screen displays in an *additional* browser window. The date on which the statistics report was requested is shown at the top of the screen.
- The Patron Group Statistics screen provides the following information:
  - **No.** - the sequence number of the associated **Patron Group.**
  - **Group** - the name of the Patron Group.
  - **Status** - the current status of the associated **Group;** either **Active** or **Inactive.**
  - **Staff** - A Yes/No value indicating whether the **Group** is available to staff.
  - **Patron** - A Yes/No value indicating whether the **Group** is available to patrons.
  - **Stats** - the *total number* of users (patrons and staff) currently assigned to the associated **Group.**
- If desired, you may:
  - Print a copy of the Patron Group statistics report
  - Save a copy of the Patron Group statistics report to your local workstation
  - Email a copy of the Patron Group statistics report to yourself or to another party

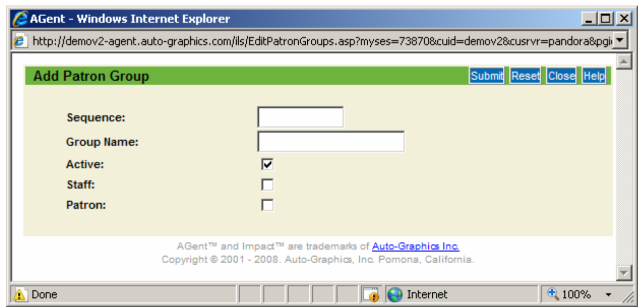
- Click the **Close** button to close the Patron Group Statistics screen and return to the Patron Groups screen.

Adding a Patron Group

You can add a *new* Patron Group to your AGent system.

Once a Patron Group has been added to the AGent system, it *cannot* be deleted. If a Patron Group is no longer used by your library and you wish to remove the Patron Group from the **Patron Group** menus throughout the system, you must set the status of the patron group to "inactive."

To add a patron group:



Add a Patron Group Screen

1. On the Patron Groups screen, click the **Add a Group** button.
   - The Add Patron Group screen displays in an *additional* browser window.
2. Enter the desired display sequence number for the new group in the **Sequence** text box.
   - The **Sequence** number determines the order in which the group is displayed in the Patron Groups screen.
   - You can enter *any* number from "**1**" through "**999999**" as the display **Sequence** number.
3. Enter a name for the new group in the **Group Name** text box.

The **Group Name** *cannot* exceed 50 characters (*including* spaces).

4. Use the **Active** checkbox to set the desired status for the Patron Group:
   - A *checkmark* indicates the patron group is *active* (is available in Patron Group menus throughout the system).
   - An *empty checkbox* indicates the patron group is *not active* (is *not* available in Patron Group menus throughout the system).
   - Clicking a checkbox repeatedly will toggle it on and off.
5. Use the **Active** checkbox to indicate whether the Patron Group includes **Staff**.
   - A *checkmark* indicates the Patron Group includes Staff.
   - An *empty checkbox* indicates the Patron Group does not include Staff.
   - Clicking a checkbox repeatedly will toggle it on and off.
6. Use the **Active** checkbox to indicate whether the Patron Group includes **Patrons**.
   - A *checkmark* indicates the Patron Group includes Patrons.
   - An *empty checkbox* indicates the Patron Group does not include Patrons.
   - Clicking a checkbox repeatedly will toggle it on and off.

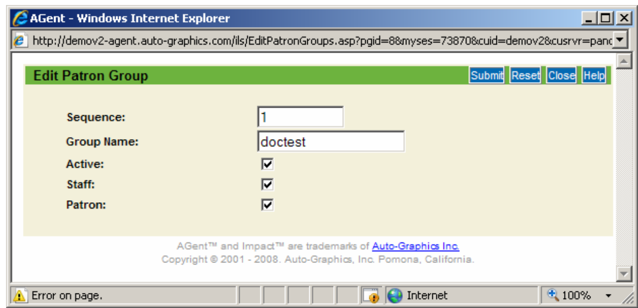
7. Click the **Submit** button on the Add Patron Group screen to submit the new Patron Group. (Click the **Close** button to close the Add Patron Group screen *without* adding the new Patron Group.)
   - The Patron Groups screen refreshes to display the new Patron Group.

Editing Patron Groups

You can change the name, display sequence, or status of *any* existing Patron Group.

To edit a patron group:

1. On the Patron Groups screen, click the **Edit** button for the Patron Group you wish to edit.
   - The Edit Patron Group screen displays in an *additional* browser window. The screen is prefilled with the current values for the selected **Group**.



Edit a Patron Group Screen

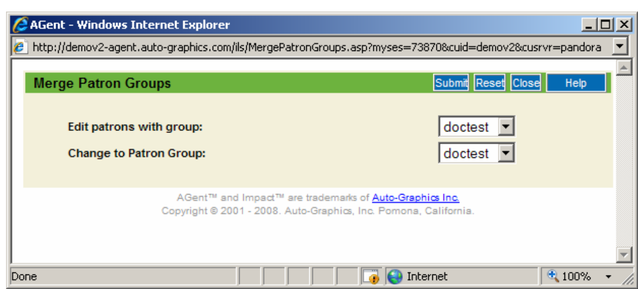
2. Make any necessary changes and click the **Submit** button on the Edit Patron Group screen to submit your changes. (Click the **Close** button to close the Edit Patron Group screen *without* saving your changes.)
   - The Patron Groups screen refreshes to display your changes.

Merging Patron Groups

You can combine *two* individual Patron Groups into a *single* Patron Group by merging the patrons from one group into another.

To merge patron groups:

1. On the Patron Groups screen, click the **Merge Groups** button.
   - The Merge Patron Groups screen displays in an *additional* browser window.
2. Select the Patron Group you wish to *merge into* another Group from the **Edit patrons with group** drop-down menu.



Merge Patron Groups Screen

The **Edit patrons with group** menu lists *all* Patron Groups currently defined for your library.

3. Select the Patron Group *into which* you wish to merge the previously selected Group from the **Change to Patron Group** drop-down menu.

The **Change to Patron Group** menu lists *all* patron groups currently defined for your library.

4. Click the **Submit** button on the Merge Patron Groups screen to merge the selected categories.

Be sure to select the Patron Groups you wish to merge in the correct order. Patrons in the Group selected from the **Edit patrons with group** menu will be *re-identified* as patrons of the Group selected from the **Change to Patron Group** menu.

- The Patron Groups screen refreshes to display your changes.

If the “merged” Patron Group (selected from the **Edit patrons with group** menu) will *no longer* be used by your library, set the status for the Patron Group to “inactive.”

Printing Patron Category/Group Parameters

You can print a copy of the Patron Category/Group list or Patron Category/Group Stats.

To print Patron Category/Group parameters:

1. On the desired parameters screen, click the **Print** button.
   - A standard Windows Print dialog displays.
2. Make the appropriate selection on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

Saving Patron Category/Group Parameters

You can save a copy of the Patron Category/Group list or Patron Category/Group Stats to your local workstation.

To save Patron Category/Group parameters:

1. On the desired parameters screen, click the **Save** button.
   - A File Download dialog displays.
2. Click the **Save** button on the File Download dialog.
   - A standard Save As dialog displays.
3. Enter a name for the file in the **File name** text box.
4. Select the location in which you wish to save the file.
5. Click the **Save** button to download the file.
   - Depending on your browser, a status dialog may display while the file is being downloaded. When the file has been downloaded, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

Emailing Patron Category/Group Parameters

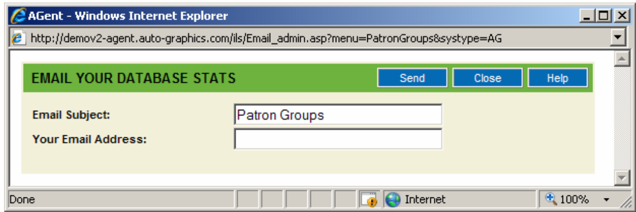
You can email a copy of the Patron Category/Group list or Patron Category/Group Stats to yourself or another staff member.

To email Patron Category/Group parameters:

1. On the desired parameters screen, click the **Email** button.

- The Email Address screen displays in an *additional* browser window.

2. Enter a subject line for the email in the **Email Subject** text box.
3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the **Your Email Address** text box.



Email Address Screen

4. Click the **Send** button to send of copy of the selected circulation parameters to the specified email address.
   - The message “An Email was sent to: (*email address*)” displays. Click the **Close** button to close the message.

Chapter 3. MAINTAINING THE USER DATABASE

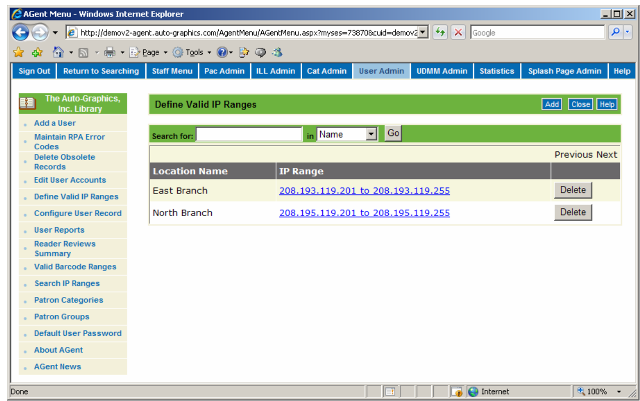
User Administration lets you define valid IP ranges and/or barcode ranges for authenticated access to AGent, and to maintain RPA error codes. You may also delete obsolete (inactive) users from the database.

Defining Valid IP Ranges

If your library utilizes "IP authentication", you can use the **Define Valid IP Ranges** function to define the IP ranges for which "generic" patron access to AGent will be granted.

To view IP ranges:

1. From the **User Administration** menu, select **Define Valid IP Ranges**.
   - The Define Valid IP Ranges screen displays. The screen lists *all currently defined* IP Ranges for your library, in alphabetic order, by **Location Name**. If *multiple* IP addresses have been assigned the *same* **Location Name**, the IP addresses with the same **Location Name** are sorted in numeric order.



Define Valid IP Ranges Screen

   - The screen shows the **Location Name** and **IP Range** for *all* currently established IP ranges for your library.

2. Use the **Previous** and **Next** links to view other pages of the list.
   - The **Previous** and **Next** links are active *only* when the list of Valid IP ranges contains *more than 20* defined address/ranges.

3. Use the **Search for** function to locate a *specific* IP Range in the list. You may search for IP Ranges by **Location Name** or **IP Address**.
   - Enter the desired **Location Name** or **IP Address** in the **Search for** text box.
     - When searching the Valid IP Ranges list, AGent reads the **Search for** term as a string of characters (rather than as separate words), reading each character from left to right. You may enter either a partial *or* complete **Location Name** or **IP Address** as the search criteria.
   - Select **Name** or **IP Address** from the **in** menu, as appropriate.
   - Click the **Go** button.

When searching by **IP Address**, the list of Valid IP Ranges is *automatically* resorted, in numeric order, by **IP Range**.

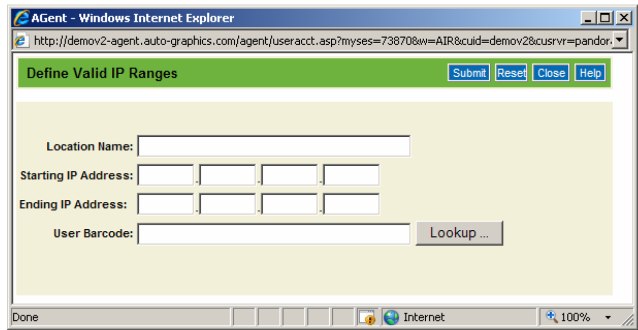
   - The Define Valid IP Ranges screen refreshes.
   - If an *exact* match *is* located, the first occurrence of the **Location Name** or **IP Address**, as appropriate, appears as the first entry in the list.

- ○ If an *exact* match *is not* located, the first entry in the list which *immediately* follows the **Location Name** alphabetically, or **IP Range** numerically, as appropriate, appears as the first entry in the list.

> To *resort* the list by either **Location Name** or **IP Address**, leave the **Search for** text box *blank*, select the desired sort format from the **in** menu (either **Name** or **IP Address**), then click the **Go** button.

To add an IP range:

1. From the Define Valid IP Ranges screen. click the **Add** button.
   - The Add IP Range screen displays in an *additional* browser window.



Add IP Range Screen

2. Enter a name to identify the IP address range in the **Location Name** text box.
   - The **Location Name** may include both alphabetic and numeric characters. The **Location Name** may be a *maximum* of 50 characters in length, *including spaces*.
3. Enter the desired IP address (or address range) in the **Starting IP Address** and **Ending IP Address** text boxes.
   - To enter an *IP address range*, enter the desired *starting* IP address in the **Starting IP Address** text boxes; enter the desired *ending* IP address in the **Ending IP Address** text boxes.

   > The **Ending IP Address** must be *greater* than the **Starting IP Address**. You may use only the *third* and *fourth* bytes of the IP Addresses to specify an IP address range; e.g., 208.193.**118.1** to 208.193.**119.255**.

   - To enter a *single IP address*, enter the desired address in the **Starting IP Address** text box.
4. Click the **Submit** button to add the specified IP address(es) to the list of valid IP ranges for your library.
   - The Add IP Range screen closes *automatically*, and the Define Valid IP Ranges screen refreshes to display your changes.

   > If you enter an *improperly formatted* IP address in the **Starting IP Range** or **Ending IP Range** text boxes, an error dialog displays the message "Invalid *(Starting/Ending)* IP Address. Please reenter. "Click the **OK** button to close the message, and re-enter the **Starting IP Address** or **Ending IP Address**, as appropriate.

   > If the **Starting IP Address** is *greater than* the **Ending IP Address**, an error dialog displays the message "Ending IP MUST be greater than Starting IP. "Click the **OK** button to close the message, and re-enter the **Starting IP Address** and/or **Ending IP Address**, as appropriate.

5. Repeat steps **1** through **4** to add *additional* IP addresses.

To edit a current IP address:

1. From the Define Valid IP Ranges screen. click the **IP Range** link for the IP range you wish to edit.
   - The Edit IP Range screen displays in an *additional* browser window.
   - The screen is prefilled with the current values for the selected IP range.
2. Edit the **Location Name**, **Starting IP Address** and **Ending IP Address**, as desired.
3. Click the **Submit** button to submit your changes to the IP range.
   - The Edit IP Range screen closes *automatically*, and the Define Valid IP Ranges screen refreshes to display your changes.

   If you enter an *improperly formatted* IP address in the **Starting IP Range** or **Ending IP Range** text boxes, an error dialog displays the message "Invalid *(Starting/Ending)* IP Address. Please reenter. "Click the **OK** button to close the message, and re-enter the **Starting IP Address** or **Ending IP Address**, as appropriate.

   If the **Starting IP Address** is *greater than* the **Ending IP Address**, an error dialog displays the message "Ending IP MUST be greater than Starting IP. "Click the **OK** button to close the message, and re-enter the **Starting IP Address** and/or **Ending IP Address**, as appropriate.
4. Repeat steps **1** through **3** to edit *additional* IP addresses.

To delete a current IP range:

1. From the Define Valid IP Ranges screen. click the **Delete** button for the IP range you wish to delete.
   - A confirmation dialog displays the message "Are you sure you want to delete this Range?"
2. Click the **OK** button to delete the selected IP Range. (Click the **Cancel** button to cancel the deletion and return to the Define Valid IP Ranges screen.)
   - The Define Valid IP Ranges screen refreshes with the selected IP Range removed from the list.
3. Repeat steps **1** and **2** to delete *additional* IP ranges.

Defining Valid Barcode Ranges

The **Valid Barcode Ranges** function lets you establish valid barcode ranges for use by AGent's *optional* barcode authentication feature.

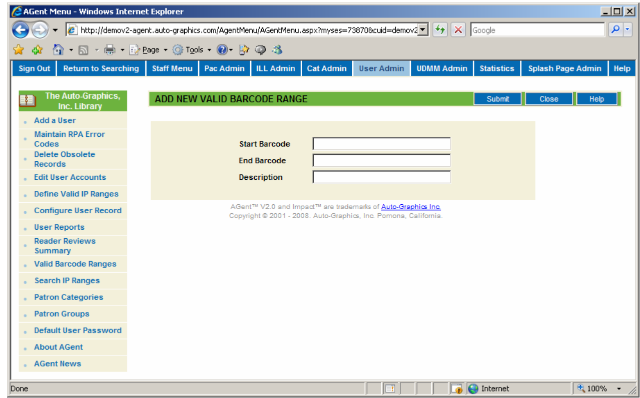
The **Valid Barcode Ranges** function is available *only* to User Administrators that are also granted Library SuperUser permissions (see the ***AGent PAC Administration User Guide*** for more information).

To view barcode ranges:

- From the **User Administration** menu, select **Valid Barcode Ranges**.
  - The Valid Barcode Range screen displays. The screen lists *all currently defined* Barcode Ranges for your library, in numeric order.
  - The screen shows the **Start Barcode** and **End Barcode** for *all* currently established barcode ranges for your library.
  - The **Description** column shows the institution name (or other identifier) with which the barcode range is associated.

To add a barcode range:

1. From the Valid Barcode Ranges screen, click the **Add** button.
   - The Add New Valid Barcode Range screen displays.
2. Enter the desired barcode (or barcode range) in the **Start Barcode** and **End Barcode** text boxes.
   - To enter a *barcode range*, enter the desired *starting* barcode in the **Start Barcode** text box; enter the desired *ending* barcode in the **End Barcode** text box.

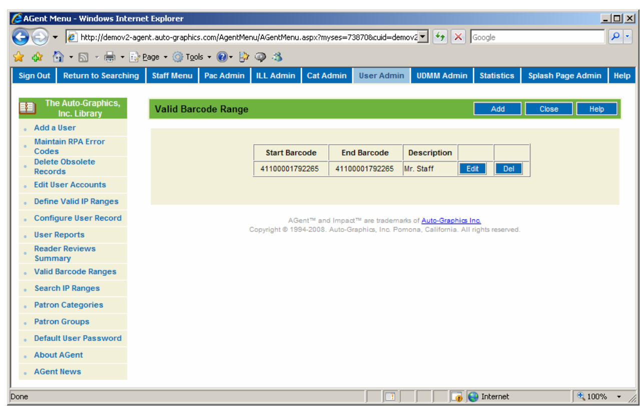


Add New Valid Barcode Range Screen

The **End Barcode** must be *greater* than the **Start Barcode**.

   - To enter a *single barcode*, enter the *same* barcode in *both* text boxes.
3. Enter the name of the institution (or other identifier) with which the barcodes are associated in the **Description** text box.
   - The **Description** may be a *maximum* of 50 characters, *including space*.
4. Click the **Submit** button to add the specified barcode(s) to the list of valid barcodes for your library.
   - The Add New Valid Barcode Range screen closes *automatically*, and the Valid Barcode Ranges screen refreshes to display your changes.

If you enter an *improperly formatted* or invalid barcode, or if the **Start Barcode** is *greater than* the **End Barcode**, an error message displays. Re-enter the **Start Barcode** and/or **End Barcode**, as appropriate



Valid Barcode Ranges Screen

5. Repeat steps **1** through **4** to add *additional* barcodes.

To edit a current barcode range:

1. From the Valid Barcode Ranges screen, click the **Edit** button for the barcode range you wish to edit.
   - The Edit Valid Barcode Range screen displays.
   - The screen is prefilled with the current values for the selected barcode range.
2. Edit the **Start Barcode, End Barcode** and **Description**, as desired.
3. Click the **Submit** button to submit your changes to the barcode range.

- The Edit Valid Barcode Range screen closes *automatically*, and the Valid Barcode Ranges screen refreshes to display your changes.

> If you enter an *improperly formatted* or invalid barcode, or if the **Start Barcode** is *greater than* the **End Barcode**, an error message displays. Re-enter the **Start Barcode** and/or **End Barcode**, as appropriate

4. Repeat steps **1** through **3** to edit *additional* barcode ranges.

To delete a current barcode range:

1. From the Valid Barcode Ranges screen. click the **Delete** button for the barcode range you wish to delete.
   - A confirmation dialog displays the message "Are you sure you want to delete this record?"
2. Click the **OK** button to delete the selected barcode range. (Click the **Cancel** button to cancel the deletion and return to the Valid Barcode Ranges screen.)
   - The Valid Barcode Ranges screen refreshes with the selected barcode range removed from the list.
3. Repeat steps **1** and **2** to delete *additional* barcode ranges.

Maintaining RPA Error Codes

> This feature is applicable to systems utilizing remote patron authentication based on a **Username or Barcode** and **Password or PIN** retrieved from a library's *remote* Standard Interchange Protocol (SIP2) user database.

Remote patron authentication in Agent is accomplished by passing the **Username or Barcode** and **Password or PIN** from the Agent login screen, as a query, to a library's *remote* Integrated Library System using the Standard Interface Protocol (SIP2). The SIP2 protocol supports the transmission of patron and other circulation data between systems. The AGent query is used to search the *remote* ILS user database, and to return the appropriate patron record to Agent. If the retrieved patron record shows the patron as being "in good standing", AGent permits an *authenticated* login to the system. If the patron record shows the patron as being "blocked" (based on patron codes returned by the *remote* ILS system), AGent permits *unauthenticated* login to the system as either a "generic" patron or as a guest.

> A copy of each patron record returned by the *remote* ILS system is also added to the AGent database. In the event the *remote* ILS database is unavailable, or if the SIP interface is not functioning, AGent queries the AGent database for login to the system. The granting or denying of *authenticated* access is accomplished in a manner similar to that described above.

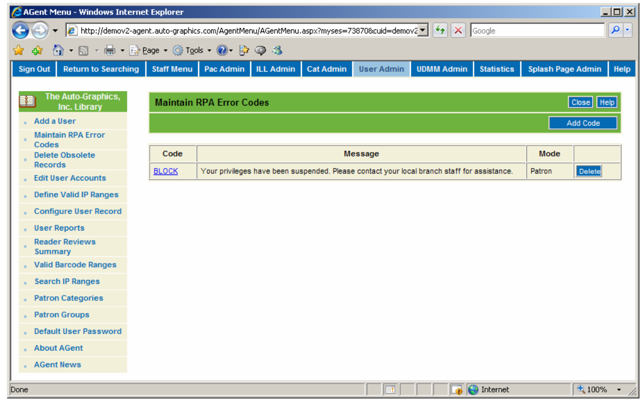
The **Maintain RPA Error Codes** function lets you define which patron error codes (returned in the patron record from the *remote* ILS user database) will result in a patron being "blocked" from *authenticated* access to AGent. You may also provide a text message to be displayed to "blocked" users, and to determine the appropriate *unauthenticated* access mode for "blocked" users; either **Patron** or **Guest**.

> You *must* know the *specific* error codes returned by your library's ILS in order to use the **Maintain RPA Error Codes** function.

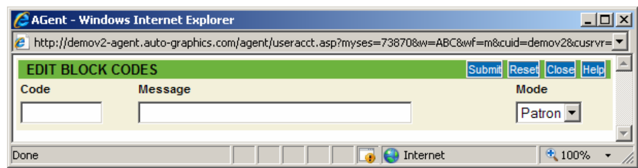
Adding a "Block" Code

You can add a *new* "block" code to your library's database.

To add a "block" code:



Maintain RPA Error Codes Screen



Edit Block Codes Screen

1. From the **User Administration** menu, select **Maintain RPA Error Codes**.
    - The Maintain RPA Error Codes screen displays.
    - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.
2. Click the **Add Code** button.
    - The Edit Block Codes screen displays in an *additional* browser window.
3. Enter the code you wish to trigger a "patron block" in the **Code** text box.
4. Enter the message you wish to be displayed to patrons who are "blocked" from *authenticated* access to the system as a result of the associated **Code** in the **Message** test box.
5. Select the desired *unauthenticated* login mode for patrons who are "blocked" from *authenticated* access to the system as a result of the associated **Code** from the **Mode** menu; either **Guest** or "generic" **Patron**.
6. Click the **Submit** button to add the "block" code to your library's AGent database. (Click the **Cancel** button *before* submitting to cancel the addition.)
    - The Edit Block Codes screen closes *automatically*, and the Maintain RPA Error Codes screen refreshes to display the added code.
7. Repeat steps **2** through **6** to add *additional* codes.

Editing "Block" Codes

You can edit an *existing* "block" code for your library.

To edit a "block" code:

1. From the **User Administration** menu, select **Maintain RPA Error Codes**.
    - The Maintain RPA Error Codes screen displays.
    - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.
2. Click the **Code** you wish to edit.
    - The Edit Block Codes screen displays in an *additional* browser window.
    - The Edit Block Codes screen is pre-filled with current information for the code.
3. Edit the **Code**, **Message** and login **Mode**, as desired (see ***Adding a "Block" Code*** on page **3-5** for details).

4. Click the **Submit** button to submit your changes to the "block" code. (Click the **Cancel** button *before* submitting to cancel your changes.)
   - The Edit Block Codes screen closes *automatically*, and the Block Codes screen refreshes to display your changes.
5. Repeat steps **2** through **4** to edit *additional* codes.

Deleting "Block" Codes

You can delete an *existing* "block" code from your library's database.

To delete a "block" code:

1. From the **User Administration** menu, select **Maintain RPA Error Codes**.
   - The Maintain RPA Error Codes screen displays.
   - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.
2. Click the **Delete** button for the code you wish to delete.
   - A confirmation dialog displays the message "Continue to Delete Code (*code*)?".
3. Click the **OK** button on the confirmation dialog to delete the "block" code from your library's database. (Click the **Cancel** button to cancel the deletion.)
   - The Block Codes screen refreshes with the deleted code removed from the list.
4. Repeat steps **2** and **3** to delete *additional* "block" codes.

Deleting Inactive Users

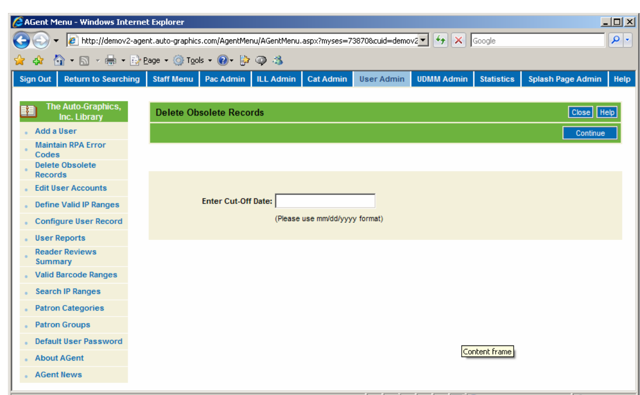
You can delete inactive (obsolete) user records from your library's database based on a specified cutoff date. User records for all users who *have not* logged into AGent from the specified date to the current date are deleted from your library's database.

> The User Administrator and "generic" patron user records *will not* be deleted from the database *under any circumstances*.

To delete inactive users:

1. From the **User Administration** menu, select **Delete Obsolete Records**.
   - The Delete Obsolete Records screen displays.
2. Enter the desired cutoff date in the **Enter Cut-Off Date** text box.

> Enter the cutoff date using the format **mm/dd/yyyy**. *Be sure* to include the slashes "/" when entering the cutoff date.

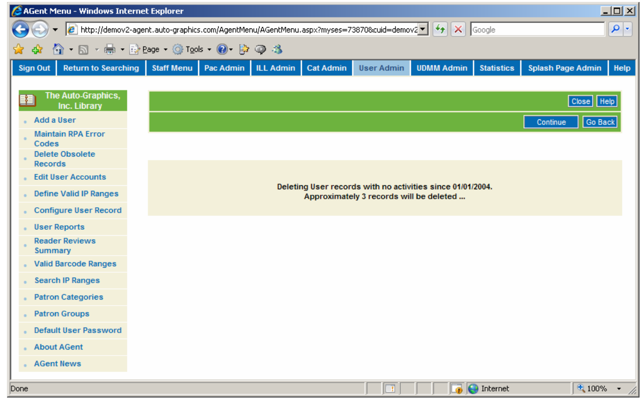


Delete Obsolete Records Screen

- For example, to delete user records for all users that have not logged into AGent since January 1, 2002, enter **01/01/2002** in the **Enter Cut-Off Date** text box.

3. Click the **Continue** button. (Click the **Cancel** button to cancel the deletion and close the Delete Obsolete Records window.)

   - The Delete Obsolete Records screen refreshes to display a confirmation message indicating the *estimated* number of user records that will be deleted from your library's database.

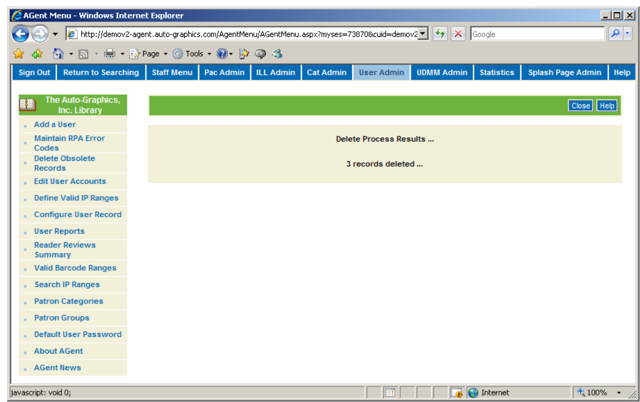


Confirmation Message

4. Click the **Continue** button to delete the inactive records. (Click the **Go Back** button if you wish to enter a *different* cutoff date.)

   - The Delete Obsolete Records screen refreshes to display a status message indicating the *actual* number of user records deleted from your library's database.

5. Click the **Close** button to close the status message.



Status Message

Working with Reader Reviews

AGent offers a Reader Reviews feature that allows AGent users (library patrons and staff members) to contribute to the OPAC by submitting comments, reviews, ratings and other information related to a title to provide peer input to the library’s collections. Users retain control to edit or delete reviews they have submitted.

Availability of Reader Reviews functionality, including the ability to establish policy for submitting reviews, is facilitated through both the User Administration module and the PAC Administration modules (see the ***AGent PAC Administration User Guide*** for details).

The **Reader Reviews Summary** feature lets you view the content of reviews submitted by *any* AGent user (library patron and staff member), selectively *delete* reviews, and block *selected* users from submitting Reader Reviews. You can access the Manage Reader Reviews screen to enable/disable availability of Reader Reviews, establish policy for submitting reviews, enable “mediated” Reader Reviews functionality, and allow users to report “inappropriate” Reader Reviews. You can also access the Mediate Pending Reader Reviews screen to approve or delete “pending” reviews on a user-by-user basis.

Accessing and Viewing Reader Reviews

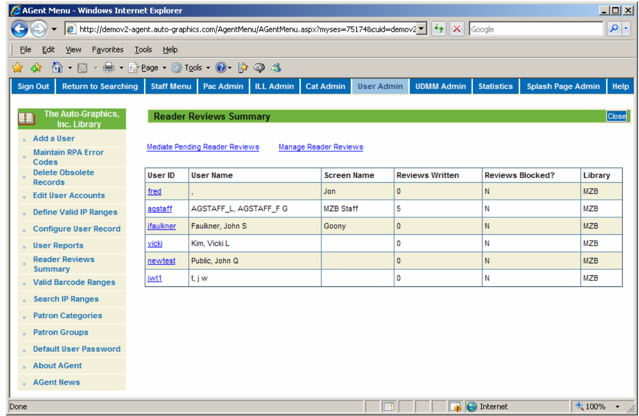
You can view the content of reviews submitted by *any* AGent user (library patrons and staff members).

To access and view reader reviews:

1. From the **User Administration** menu, select **Reader Reviews Summary**.

- The Reader Reviews Summary screen displays.

- The Reader Reviews Summary screen shows an alphabetical listing, by **Patron Name**, of all library patrons and staff members that have accepted your library's "Reviews Policy Statement" and have submitted *at least one* review.



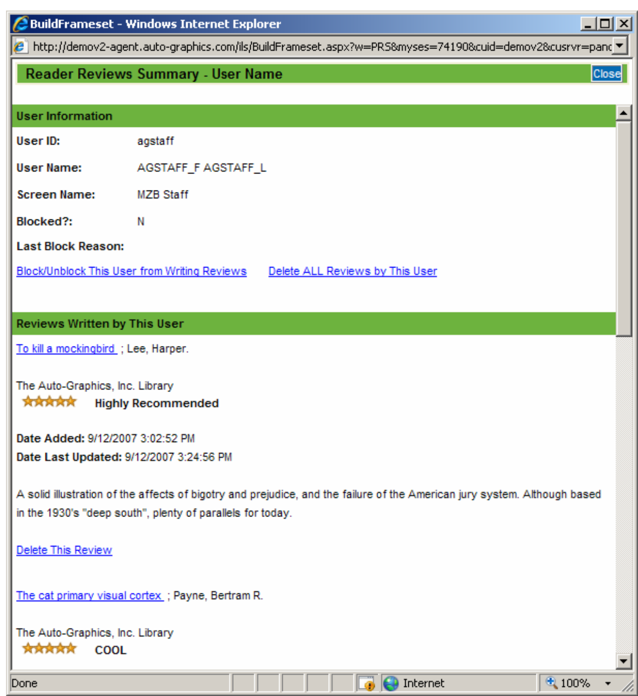
Reader Reviews Summary Screen

> For libraries that have enabled "mediated" Reader Reviews (see ***Managing Reader Reviews*** on page **3-12** for details), users are not added to the Reader Reviews Summary screen until *at least one* review submitted by the user has been approved by library staff.

- Each line in the listing provides the following information:
  - **User Name:** The username or barcode of the user.
  - **Patron Name:** The name of the user (last name, first name, middle initial).
  - **Screen Name:** The screen name *most recently* entered by the user when submitting a review.
  - **Reviews Written:** The total number of *currently active* reviews written by the user.
  - **Reviews Blocked?**: Indicates whether or not the user is currently blocked from writing reviews; either **Y** (user *is* blocked from writing reviews) or **N** (user *is not* blocked from writing reviews).
  - **Library:** The code assigned to the library under which the user submitted the review.

2. Click a **User Name** to view all *currently active* reviews written by the user.

   - The Reader Reviews screen for the selected user displays in an *additional* browser window.
   - The **User Information** field provides general information about the user, including:
     - **User Name:** The username or barcode of the user.
     - **Patron Name:** The name of the user.
     - **Screen Name:** The screen name *most recently* entered by the user when submitting a review.



Reader Reviews Screen

  - **Blocked?**: Indicates whether or not the user is currently blocked from writing reviews; either **Y** (user *is* blocked from writing reviews) or **N** (user *is not* blocked from writing reviews).
  - **Last Block Reason:** The reason the user has been blocked from writing reviews.
- The **Reviews Written by This User** field shows all *currently active* reviews written by the user.

3. If desired, click a "title" link for any review to view *all reviews* for the title by *all users*.
   - A listing of *all reviews* written for the title by *all users* displays in an *additional* browser window. Click the ☒ button in the upper right hand corner of the window to close the window.
4. From the Reader Reviews screen, you may choose to:
   - Delete a *selected* review, or delete *all* reviews, written by the user (see ***Deleting Reader Reviews*** on page **3-10** for details)
   - Block or unblock Reader Review privileges for the user (see ***Blocking and Unblocking Reader Review Privileges*** on page **3-11** for details)
5. Click the **Close** button to close the Reader Reviews screen.

Deleting Reader Reviews

You can selectively *delete* reviews written by *any* AGent user. You may also choose to delete *all reviews* for a user.

To delete Reader Reviews:

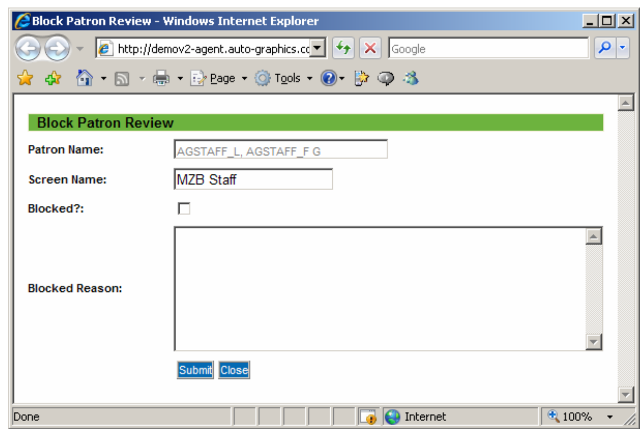
1. Access the Reader Reviews screen for the desired user (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details).
2. To delete a *selected* review for the user:
   - Locate the review you wish to delete.
   - Click the **Delete this review** link for the review.
     - A confirmation dialog displays the message "Continue to Delete Review (*review name* by *patron name*)?"
   - Click the **OK** button on the confirmation dialog to complete the deletion. (Click the **Cancel** button to cancel the deletion and close the confirmation dialog.)
     - The confirmation message "REVIEW HAS BEEN SUCCESSFULLY DELETED" displays. Click the **Close** button to close the message. The Reader Reviews screen refreshes with the selected review deleted.
3. To delete *all reviews* for the user:
   - In the **User Information** field, click the **Delete ALL Reviews by This User** link.
     - A confirmation dialog displays the message "Continue to Delete ALL Reviews by (*patron name*)?"
   - Click the **OK** button on the confirmation dialog to complete the deletions. (Click the **Cancel** button to cancel the deletions and close the confirmation dialog.)
     - The confirmation message "REVIEWS HAVE BEEN SUCCESSFULLY DELETED" displays. Click the **Close** button to close the message. The Reader Reviews screen refreshes with ALL reviews deleted.

Blocking and Unblocking Reader Review Privileges

You can block *any* AGent user that has accepted your library's "Reviews Policy Statement" (see the ***AGent User Guide*** for more information) from submitting Reader Reviews. You may also "unblock" currently blocked users.

To "block" Reader Review privileges:

1. Access the Reader Reviews screen for the desired user (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details).
2. In the **Patron Information** field, click the **Block/Unblock This User from Writing Reviews** link.
   - The Block Patron Review screen displays in an *additional* browser window.
3. If desired, you may edit the **Screen Name** for the user.
4. Select the **Blocked?** checkbox to "block" reader review privileges for the user.
   - A *checkmark* indicates the user *is* "blocked" from submitting Reader Reviews.
5. Enter the reason the user's privileges have been "blocked" in the **Blocked Reason** text box.



Block Patron Review Screen

   - The **Blocked Reason** is shown in the **Last Block Reason** field in the **Patron Information** section of the Reader Reviews screen for the user (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details), and is displayed to the user when the **Write an online review** option is selected in the AGent Search module (see the ***AGent User Guide*** for more information).
6. Click the **Submit** button to save your changes. (Click the **Close** button to cancel your changes and close the Block Patron Review screen.)
   - The Block Patron Review screen closes *automatically*, and the Reader Reviews screen refreshes to display your changes.

To "unblock" Reader Review privileges:

1. Access the Reader Reviews screen for the desired user (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details).
2. In the **Patron Information** field, click the **Block/Unblock This User from Writing Reviews** link.
   - The Block Patron Review screen displays.
3. If desired, you may edit the **Screen Name** for the user.
4. Unselect the **Blocked?** checkbox to "unblock" reader review privileges for the user.
   - An *empty checkbox* indicates the user *is not* "blocked" from submitting Reader Reviews.
5. Delete any text from the **Blocked Reason** text box.

6. Click the **Submit** button to save your changes. (Click the **Close** button to cancel your changes and close the Block Patron Review screen.)

    - The Block Patron Review screen closes *automatically*, and the Reader Reviews screen refreshes to display your changes.

Managing Reader Reviews

The **Manage Reader Reviews** function lets you permit or deny the ability to *write* reviews based on user type (library patrons and/or staff members), define policies governing the submittal and content of reviews, determine whether or not users may identify themselves by adding a “screen name” to their reviews, enable “mediated” Reader Reviews functionality, and allow users to report “inappropriate” Reader Reviews.

To set Reader Reviews parameters:

1. From the **User Administration** menu, select **Reader Reviews Summary**.

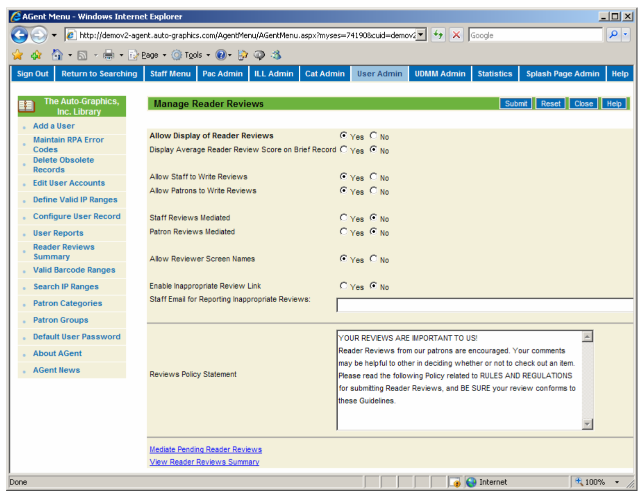
    - The Reader Reviews Summary screen displays.

2. Click the **Manage Reader Reviews** link.

    - The Manage Reader Reviews screen displays.

3. Use the **Display Average Reader Review Score on Brief Record** radio buttons to *enable* or *disable* display of the **Reader Reviews** link and average Reader Reviews “score” in “brief records” shown on the CBB display.

    - Select the **Yes** radio button to *enable* display of the **Reader Reviews** link and average Reader Reviews “score.” Select the **No** radio button to *disable* display of the **Reader Reviews** link and average Reader Reviews “score.”



Manage Reader Reviews Screen

4. Use the **Allow Display of Reader Reviews** radio buttons to *activate* or *deactivate* **Reader Reviews** functionality on Full Record Displays.

    - Select the **Yes** radio button to *activate* **Reader Reviews** functionality. Select the **No** radio button to *deactivate* **Reader Reviews** functionality.

    - When **Yes** is selected, the **Reader Reviews** button will be shown on the Full Record Display for *any item* retrieved from your library’s AG catalog(s).

5. Use the **Allow Staff to Write Reviews** and **Allow Patrons to Write Reviews** radio buttons to permit or deny the ability to *write* reviews based on user type.

    - Select the **Yes** radio button to *permit* users of the associated user type to write reviews. Select the **No** radio button to *deny* users of the associated user type the ability to write reviews.

    - When **No** is selected for a user type, users of that type may *view* reviews written by others, but *may not* contribute reviews of their own.

6. Use the **Staff Reviews Mediated** and **Patron Reviews Mediated** radio buttons to require that reviews submitted by the associated user type must be reviewed and approved by library staff *prior to* being made available for viewing through the Search module.

   - Select the **Yes** radio button to *require review and approval* of reviews submitted by users of the associated user type. Select the **No** radio button to allow reviews submitted by users of the associated user type to be made available for viewing *without review and approval*.

7. Use the **Allow Reviewer Screen Names** radio buttons to establish whether or not users may identify themselves by adding a "screen name" to their reviews.

   - Select the **Yes** radio button to *permit* users to add a screen name to their reviews. Select the **No** radio button to *prevent* users from adding a screen name to their reviews.

8. Use the **Enable Inappropriate Review Link** radio buttons to enable or disable display of the **Report this review as inappropriate** link on *all* Reader Reviews available through the Search module.

   The **Report this review as inappropriate** link lets users *automatically* submit an email to a specified email address to report reviews that may contain "inappropriate" content. The email message includes the **Title** of the item to which the review is attached, and the **User Barcode** and **User Name** of the user that submitted the review. The name of the user submitting the report *is not* included in the email message. Reported reviews are *temporarily* removed from the catalog and placed in a "pending" queue for review by library staff (see ***Mediating Reader Reviews*** on page **3-14** for details).

   - Select the **Yes** radio button to *enable* display of the **Report this review as inappropriate** link. Select the **No** radio button to *disable* display of the **Report this review as inappropriate** link.

9. If you selected the **Enable Inappropriate Review Link - Yes** radio button, enter the email address to which emails reporting inappropriate review should be sent in the **Staff Email for Reporting Inappropriate Reviews** text box.

   If you select the **Enable Inappropriate Review Link - Yes** radio button but *do not* enter an email address in the **Staff Email for Reporting Inappropriate Reviews** text box, the message "Email address is required" displays when you save your changes.

10. Enter any policies, guidelines, rules or terms and conditions by which submission of **Reader Reviews** will be governed in the **Reviews Policy Statement**.

    - The *first time* a user requests to write a review, the **Review Policy Statement** is displayed. The user is *required* to agree to the terms and conditions *before* being permitted to write a review.

    Once a user has agreed to the terms and conditions specified in the **Review Policy Statement**, the statement *is not* displayed for subsequent requests to write reviews. If you wish to make *changes* to your **Review Policy Statement**, users that have agreed to a *prior version* of the policy *will not* be made aware of the changes through the AGent system.

11. When all desired information has been entered or edited, click the **Submit** button to save your changes.

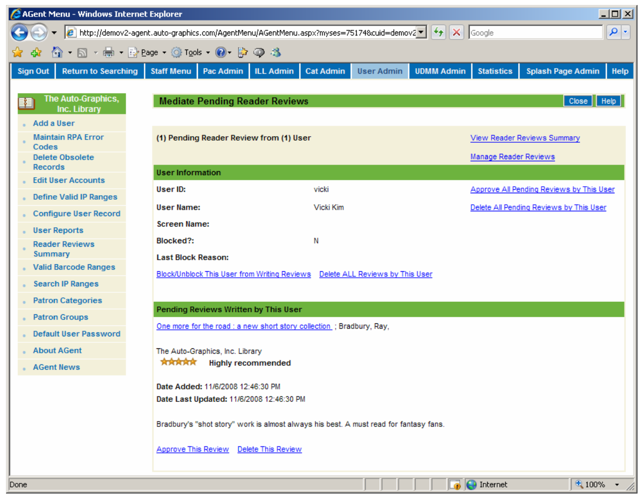
The Manage Reader Reviews screen also provides links allowing you to **Mediate Pending Reader Reviews** (see ***Mediating Reader Reviews*** on page **3-14** for details) or **View Reader Reviews Summary** (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details).

Mediating Reader Reviews

If your library has enabled “mediated” Reader Reviews functionality for patrons and/or staff, reviews submitted by users of the associated type are placed in a “pending” queue. The **Mediate Pending Reader Reviews** function lets you access, review and approve (or delete) pending Reader Reviews. Additionally, if your library has enabled the **Report this review as inappropriate** link, any reviews reported as “inappropriate” are also placed in the “pending” queue for review by library staff.

To mediate Reader Reviews:

1. From the **User Administration** menu, select **Reader Reviews Summary**.
   - The Reader Reviews Summary screen displays.
2. Click the **Mediate Pending Reader Reviews** link.
   - The Mediate Pending Reader Reviews screen displays. The screen is divided into separate sections for each user with pending reviews.
   - The **User Information** field provides general information about the user, including:
     - **User Name:** The username or barcode of the user.
     - **Patron Name:** The name of the user.
     - **Screen Name:** The screen name *most recently* entered by the user when submitting a review.
     - **Blocked?**: Indicates whether or not the user is currently blocked from writing reviews; either **Y** (user *is* blocked from writing reviews) or **N** (user *is not* blocked from writing reviews).
     - **Last Block Reason:** The reason the user has been blocked from writing reviews.
   - The **Pending Reviews Written by This User** field shows all *pending* reviews written by the user.
     - If any *previous* reviews for the user were subsequently reported as “inappropriate,” these reviews are also included in the “pending” queue, preceded by the notation “INAPPROPRIATE REVIEW.”



Mediate Pending Reader Reviews Screen

> “Inappropriate” reviews are included in the “pending” queue *only* if your library has selected the **Enable Inappropriate Review Link - Yes** radio button on the Manage Reader Reviews screen (see ***Managing Reader Reviews*** on page **3-12** for details).

   - The message “(#) Pending Reader Reviews from (#) User(s)” shows the *total number* of pending Reader Reviews, and the *total number* of users with pending reviews.
3. To approve a *selected* pending review for a user:
   - Locate the review you wish to approve.
   - Click the **Approve This Review** link for the review.

- The screen refreshes with the selected review removed from the “pending” list. The review is now available for viewing in the AGent Search module.

4. To approve *all* pending reviews for a user:

- In the **User Information** section for the desired user, click the **Approve All Pending Reviews by This User** link.
  - The screen refreshes with *all reviews* for the user removed from the “pending” list. The reviews are now available for viewing in the AGent Search module.

5. To delete a *selected* pending review for a user:

- Locate the review you wish to delete.
- Click the **Delete This Review** link for the review.
  - A confirmation dialog displays the message “Continue to Delete Review (*review name* by *patron name*)?”
- Click the **OK** button on the confirmation dialog to complete the deletion. (Click the **Cancel** button to cancel the deletion and close the confirmation dialog.)
  - The confirmation message “REVIEW HAS BEEN SUCCESSFULLY DELETED” displays. Click the **Close** button to close the message. The Mediate Pending Reader Reviews screen refreshes with the selected review deleted. The review *is not* made available for viewing in the AGent Search module.

6. To delete *all pending reviews* for a user:

- In the **User Information** field for the desired user, click the **Delete All Pending Reviews by This User** link.
  - A confirmation dialog displays the message “Delete ALL Pending Reviews for This User?”
- Click the **OK** button on the confirmation dialog to complete the deletions. (Click the **Cancel** button to cancel the deletions and close the confirmation dialog.)
  - The Reader Reviews screen refreshes with ALL pending reviews deleted. The reviews *are not* made available for viewing in the AGent Search module.

7. To delete *all active reviews* for a user:

- In the **User Information** field for the desired user, click the **Delete ALL Reviews by This User** link.
  - A confirmation dialog displays the message “Continue to Delete ALL Reviews by (*patron name*)?”
- Click the **OK** button on the confirmation dialog to complete the deletions. (Click the **Cancel** button to cancel the deletions and close the confirmation dialog.
  - The confirmation message “REVIEWS HAVE BEEN SUCCESSFULLY DELETED” displays. Click the **Close** button to close the message. The Mediate Pending Reader Reviews screen refreshes with all pending reviews deleted. The reviews *are not* made available for viewing in the AGent Search module. Additionally, *all* currently active reviews written by the user are removed from the catalog.

8. If desired, you can use the **Block/Unblock this user from writing reviews** link for a selected user to block the user) from submitting Reader Reviews, or to “unblock” a currently blocked users (see ***Blocking and Unblocking Reader Review Privileges*** on page **3-11** for details).

The Mediate Pending Reader Reviews screen also provides links allowing you to **Manage Reader Reviews** (see ***Managing Reader Reviews*** on page **3-12** for details) or **View Reader Reviews Summary** (see ***Accessing and Viewing Reader Reviews*** on page **3-8** for details).

Chapter 4. USER ADMINISTRATION

In addition to the standard features and functions available to *all* User Administrators, Customer SuperUsers can use AGent's User Administration module to maintain the *default* user record form, and to generate user database reports for a *selected* library or for *all libraries* within a consortium or collective.

This chapter provides the procedures to:

- Configure the default user record form
- Generate user reports
- Search IP Ranges

Configuring the User Record

Agent's User Record is comprised of *up to 18* preset data fields. The **Configure User Record** function lets you establish the *specific* fields you wish included in the user record, determine the order in which the selected fields are displayed, and configure the User Record display shown to *authenticated* users via the **My Account** function (see the ***AGent User Guide*** for more information).

To configure the *default* user record form:

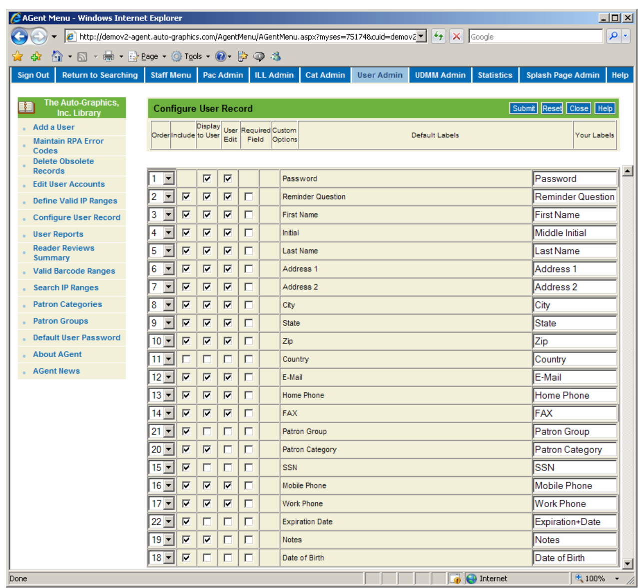
> The *default* user record form is used by *all* libraries within a consortium or collective. The form *cannot* be modified by individual libraries.

> The **Language** function on the Configure User Record screen is available *only* for those libraries, consortia or collectives that have purchased AGent's *optional* multi-language functionality.

1. From the **User Administration** menu (see ***The User Administration Menu*** on page **1** for details), select **Configure User Record**.

   - The Configure User Record screen displays. The screen lists 18 data fields you may select to include in the *default* user record form for your consortium or collective.

   > The **Username** field (not included on the Configure User Record screen) is *mandatory*, and is *always* included in the user record form.



Configure User Record Screen

2. Use the **Include** and **Required Field** checkboxes to select the data fields you wish to include in the *default* user record form.

   - A *checkmark* ☑ indicates the associated option *is* selected; an *empty checkbox* ☐ indicates the associated option *is not* selected. Clicking a checkbox repeatedly will toggle it on and off.

- Select the **Include** checkbox for each data field you wish to include in the *default* user record form.

> The **Password** field is *always* included in the user record form, and *cannot* be deselected.

- Select the **Required Field** checkbox for each data field you wish to configure as a "mandatory entry" field.

> If a data field is selected as a **Required Field**, a user record *cannot* be saved unless data is entered in the field.

> The **Password** field is *always* a "mandatory field", and *cannot* be deselected.

3. Use the **Display to User** and **User Edit** checkboxes to configure the User Record displayed to patrons or staff members using the **My Account** function.

    - A *checkmark* ☑ indicates the associated option *is* selected; an *empty checkbox* ☐ indicates the associated option *is not* selected. Clicking a checkbox repeatedly will toggle it on and off.
    - Select the **Display to User** checkbox for each field that will be displayed to patrons or staff members when viewing their User Record using the **My Account** function.
        - The **Include** checkbox must be selected for any field for which you have selected the **Display to User** checkbox.
    - Use the **User Edit** checkboxes to select the fields that may be edited by patrons or staff members when viewing their User Record using the **My Account** function.
        - The **Include** and **Display to User** checkboxes *must* be selected for any field for which you have selected the **User Edit** checkbox.

4. Use the **Order** menus to establish the order in which selected fields will be listed in the User Record.

    - Each **Included** field *must* be assigned a *unique* **Order** (display sequence) number.

5. The **Default** Labels fields show the *default* names for the associated User Record fields. If desired, use the **Your Labels** text boxes to specify a *different* name for the associated field.

6. When all desired information has been entered, click the **Submit** button to save your changes.

    - The User Administration "Welcome" screen displays.

> If you assign *the same* **Order** (display sequence) to *two or more* fields, an error dialog displays the message "You cannot have 2 fields with the identical order" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Make sure each **Included** field has a *unique* **Order** (display sequence) number, then resubmit the form.

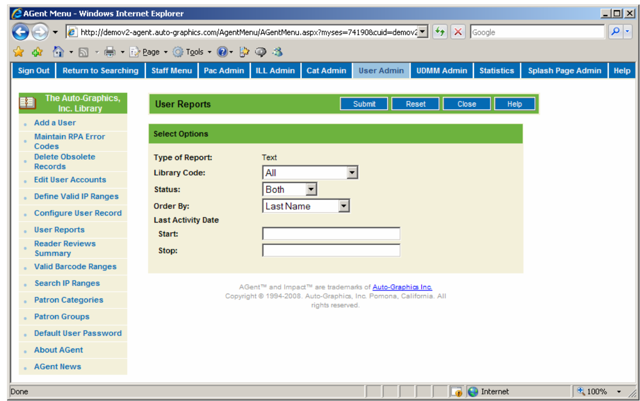
> If you select the **Display to User**, **User Edit** and/or **Required Field** checkbox(es) for a field for which the **Include** checkbox *is not* selected, an error dialog displays the message "(*field name*) - Include must be checked in order for others to be checked" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Select the **Include** checkbox, or unselected the **Display to User**, **User Edit** and/or **Required Field** checkbox(es) for the affected fields, as desired, then resubmit the form.

> If you select the **User Edit** for a field for which the **Display to User** checkbox *is not* selected, an error dialog displays the message "(*field name*) - If User Edit is Checked, then Display to User must also be checked" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Select the **Display to User** checkbox, or unselected the **User Edit**, checkbox for the affected fields, as desired, then resubmit the form.

Generating User Reports

The **User Reports** function lets you generate a *customized* listings of *authenticated* users for *any* single library in the consortium or collective, or a combined report for *all* libraries in the consortium or collective, based on the criteria you specify. Reports are displayed on-screen.

To generate a user report:



User Reports Screen

1. From the **User Administration** menu, (see ***The User Administration Menu*** on page **1** for details), select **User Reports**.
   - The User Reports screen displays.
2. Select the library for which you wish to generate the report from the **Library Code** menu.
   - The **Library Code** menu lists the library codes for *all* libraries in your consortium or collective. You may generate a report for a *single* selected library, or for **All** libraries combined.
   - The *default* selection for **Library Code** is **All**.
3. Select the desired current account status for users you wish included in the report from the **Status** menu; either **Enabled**, **Disabled** or **Both**.

Account status is set in the User Record for *each* authenticated AGent user (patron or staff member).

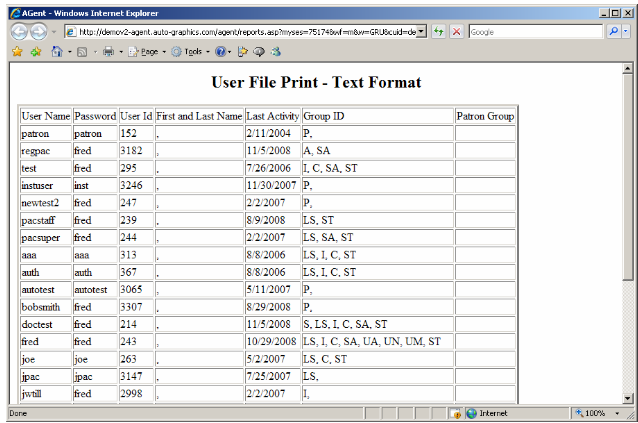
   - The *default* selection for **Status** is **Both**.
4. Select the desired sort order for the report from the **Order By** menu; either alphabetically by **Last Name**, alphabetically by **Username** or chronologically by **Last Activity Date** or alphabetically by **Library Code**.
   - The *default* value for **Order By** is **Last Name**.
5. If desired, use the **Last Activity Date** text boxes to limit the report to users who last logged into AGent on a specified day (or range of days).
   - Enter dates using the format "MM/DD/YYYY", *including* slashes.
   - Enter the start date for the desired last activity date range in the **Start** text box.
   - Enter the stop date for the desired last activity date range in the **Stop** text box.
   - To limit the last activity date range to a *single* day, enter the *same date* in *both* the **Start** and **Stop** text boxes.
6. When all desired report parameters have been specified, click the **Submit** button to submit your report request.
   - The User Report screen displays in an *additional* browser window (see ***Viewing User Reports*** on page **4-22** for details).

Viewing User Reports

When you submit a report request, and select the **Type of Report - Text** option, the User Report Summary screen displays.

To view the User Report:

The User Report provides the following information:



User File Print - Text Format

User Name	Password	User Id	First and Last Name	Last Activity	Group ID	Patron Group
patron	patron	152	,	2/11/2004	P,	
regpac	fred	3182	,	11/5/2008	A, SA	
test	fred	295	,	7/26/2006	I, C, SA, ST	
instuser	inst	3246	,	11/30/2007	P,	
newtest2	fred	247	,	2/2/2007	P,	
pacstaff	fred	239	,	8/9/2008	LS, ST	
pacsuper	fred	244	,	2/2/2007	LS, SA, ST	
aaa	aaa	313	,	8/8/2006	LS, I, C, ST	
auth	auth	367	,	8/8/2006	LS, I, C, ST	
autotest	autotest	3065	,	5/11/2007	P,	
bobsmith	fred	3307	,	8/29/2008	P,	
doctest	fred	214	,	11/5/2008	S, LS, I, C, SA, ST	
fred	fred	243	,	10/29/2008	LS, I, C, SA, UA, UN, UM, ST	
joe	joe	263	,	5/2/2007	LS, C, ST	
jpac	jpac	3147	,	7/25/2007	LS,	
jwtill	fred	2998	,	2/2/2007	I,	

Typical User Reports Screen

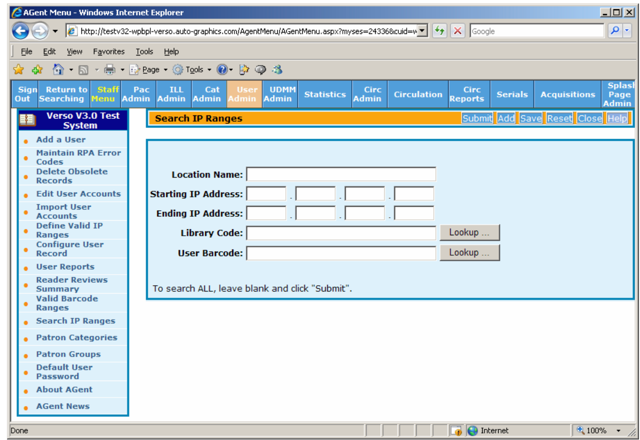
- **Library Code** - The *unique* library code for the library of which the associated user is a member. This field is shown *only* for reports in which **Library Code - All** was selected during report setup.
- **User Name** - The *unique* username assigned to the patron or staff member.
- **Password** - The current password for the associated user.
- **User ID** - The system-assigned user identification number for the associated user.
- **First and Last Name** - The user's first and last name (last name, first name, middle initial).
- **Last Activity** - The most recent date on which the user logged into AGent.
- **Group ID** - The Group ID(s) to which the user is assigned, as follows:
  - **P** - Patron
  - **A** - PAC Staff
  - **I** - ILL Staff
  - **C** - Cat Staff
  - **UA** - UDMM Admin
  - **UM** - UDMM Merge
  - **UN** - UDMM Notes
  - **LS** - Library SuperUser
  - **SA** - User Administrator

Searching IP Ranges

The **Search IP Ranges** function lets you generate a listing of *all libraries* that have configured a specified IP range as *valid* using the **Define Valid IP Ranges** function. You can search by location name, IP address range, library code, and/or user barcode. You can also define a *new* valid IP range (see ***Defining Valid IP Ranges*** on page **4-1** for details).

The **Search IP Ranges** function is available to Customer SuperUsers *only*.

To search IP ranges:



Search IP Ranges Screen

1. From the **User Administration** menu, select **Search IP Ranges**.
   - The Search IP Ranges screen displays.
2. To limit your search by **Location** name, enter the desired location name in the **Location** text box. You may enter a *complete* or *partial* **Location** name.
3. To limit your search by IP address, enter the desired IP address (or address range) in the **Starting IP Address** and **Ending IP Address** text boxes.
   - To enter an *IP address range*, enter the desired *starting* IP address in the **Starting IP Address** text boxes; enter the desired *ending* IP address in the **Ending IP Address** text boxes.

   > The **Ending IP Address** must be *greater* than the **Starting IP Address**. You may use only the *third* and *fourth* bytes of the IP Addresses to specify an IP address range; e.g., 208.193.**118.1** to 208.193.**119.255**.

   - To enter a *single IP address*, enter the desired address in the **Starting IP Address** text box.
4. To limit your search by library code, enter the desired library code in the **Library Code** text box. You must enter a *complete* library code. You may enter a *single* library code only.
   - If desired, you may use the **Lookup** feature to locate the code for the library for which you wish to search (see ***Using Library Code Lookup*** on page **4-6** for details).
5. To limit your search by user barcode, enter the desired user barcode in the **User Barcode** text box. You must enter a *complete* user barcode. You may enter a *single* user barcode only.
   - If desired, you may use the **Lookup** feature to locate the barcode for the user for which you wish to search (see ***Using User Barcode Lookup*** on page **4-6** for details).
6. To display a list of *all* currently defined valid IP ranges, leave *all* text boxes *blank*.
7. Click the **Submit** button.
   - The screen refreshes to display a list of *all* valid IP ranges that match your search criteria.

   > If there are *no matches* to your search criteria, the message "No Libraries found" displays.

   - If desired, click the **Edit** link for an IP range to edit the current values for the IP range (see ***Defining Valid IP Ranges*** on page **3-1** for details).
   - If desired, click the **Delete** link for an IP range to delete the IP range (see ***Defining Valid IP Ranges*** on page **3-1** for details).
   - If desired, you can save a copy of your search results to a file on your local workstation (see ***Saving Search Results*** on page **4-7** for details).

Using Library Code Lookup

If you are not sure of the **Library Code** for which you wish to search, you can use the library code **Lookup** feature to locate the desired library code.

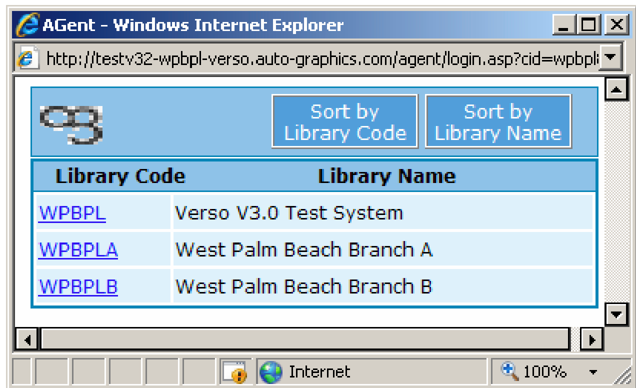
To use Library Code Lookup:

1. Click the **Library Code - Lookup** button on Search IP Ranges screen.

    - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.

    - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.

    - Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.



Library Code Lookup Screen

2. Click the **Library Code** for the library for which you wish to search.

    - The Library Code Lookup screen closes, and the selected library code is entered in the **Library Code** text box on the Search IP ranges screen *automatically*.

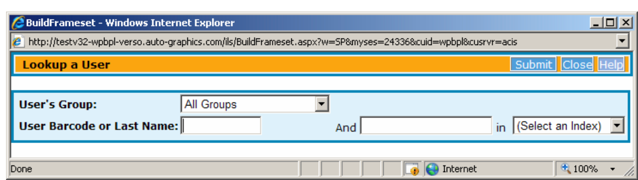
Using User Barcode Lookup

If you are not sure of the **User Barcode** for which you wish to search, you can use the user barcode **Lookup** feature to locate the desired user barcode.

To use User Barcode Lookup:

1. Click the **User Barcode - Lookup** button on Search IP Ranges screen.

    - The Lookup a User screen displays in an *additional* browser window.



Lookup a User Screen

2. Enter the desired search criteria:

    - To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Group** menu, then click the **Search** button.

        - Select **All Groups** to display users for *all* user groups.

        - Select the desired user group to display users for the associated group *only*.

    - To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Group**, leave the **User Barcode or Last Name** text box *blank*.

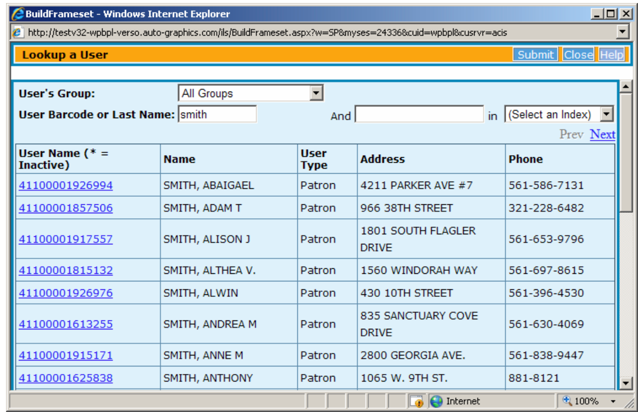
When searching by a user's name, you may enter a *complete* or *partial* last name.

- To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.

3. Click the **Submit** button to submit your search of the user database.

- The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.
- Use the **Prev** and **Next** buttons to view other pages of the list.

> The **Prev** and **Next** buttons are active *only* if your library's user database contains *more than 20* users.



User Account List

4. Click the **User Name** for the user barcode for which you wish to search.

- The Lookup a User screen closes, and the selected **User Name** is entered in the **User Barcode** text box on the Search IP ranges screen *automatically.*

Saving Search Results

You can save a copy of the list of valid IP ranges to a file on your local workstation.

To save search results:

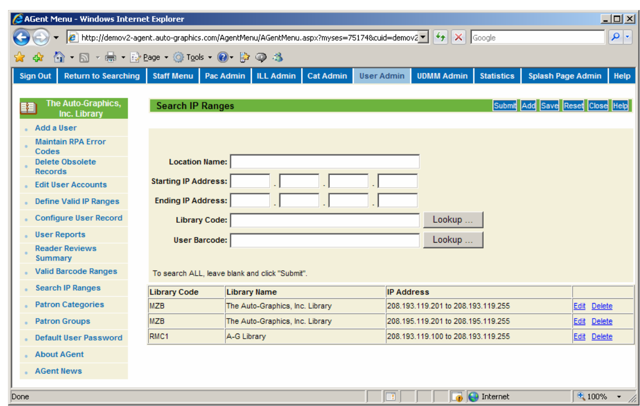
1. Use the **Search IP Ranges** function to generate a list of valid IP ranges (see ***Searching IP Ranges*** on page **4-4** for details).

2. Click the **Save** button on the Search IP Ranges Results screen.

- A File Download dialog displays.

3. Click the **Save** button on the File Download dialog.

- A standard Save As dialog displays.



Search IP Ranges Results Screen

4. Enter a name for the file in the **File Name** text box.

5. Select the location in which you wish to save the file.

6. Click the **Save** button to download the file.

- Depending on your browser, a status dialog may display while the file is being downloaded. When the file has been downloaded, a “Download Complete” message displays. Click the **Close** button to close the status dialog.

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